Travel Activities & Motivation Survey

# Interest in Hands-On Learning Experiences While on Vacation

## Profile Report

**TAMS**
Travel Activities & Motivation Survey

December, 2001

Lang
RESEARCH

# Travel Activities & Motivation Survey

Prepared by:

**Lang Research Inc.**

on behalf of

**Atlantic Tourism Partnership**

**Canadian Tourism Commission**

**Department of Canadian Heritage**

**Greater Toronto Hotel Association**

**Manitoba Ministry of Industry, Trade & Tourism**

**Northern Ontario Heritage Fund**

**Ontario Casino Corporation**

**Ontario Ministry of Agriculture, Food & Rural Affairs**

**Ontario Ministry of Tourism, Culture & Recreation**

**Ontario Tourism Marketing Partnership**

**Parks Canada**

**Saskatchewan Tourism Authority**

**Tourism B.C.**

**Tourism Toronto**

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# Interest in Hands-On Learning on Vacation

## - Key Findings -

Overall, 7.2 % (12,140,000) of the travellers in North America sought out a participatory hands-on learning experience while on vacation during the past two years. An additional 8.0 % of travellers (13,800,000) expressed an interest in participating in this type of vacation experience over the next two years. While there was little difference in the participation rate of Canadians and Americans in vacation learning experiences, Americans were 53 % more likely to express an interest in pursuing a hands-on learning experience while on vacation over the next two years.

Young Singles and Mature Singles were the most likely to have sought out hands-on learning experiences while on vacation, in both Canada and the United States. As well, in the United States, American Mature Families (i.e., those with teenage children) were much more likely to have sought out a hands-on learning experience while on vacation during the past two years.

Those who sought out a hands-on learning experience while on vacation during the past two years were also much more likely to have sought out exploratory vacation activities (e.g., visiting natural sites, museums, art galleries). This suggests that they tend to view vacations as opportunities to learn. Consistent with this fact, these travellers were quite active in a broad array of cultural and entertainment activities while on vacation, especially cultural activities such as French Canadian cultural activities, aboriginal cultural activities and cultural festivals. They were also above average patrons of the high arts (e.g., ballet, opera) and more likely than the average traveller to have visited zoos, aquariums and planetariums, museums, art galleries, historical sites, natural sites, local agricultural fairs and international sporting events.

Those who sought out hands-on learning experiences while on vacation were also quite active in a broad range of outdoor activities, especially energetic activities such as team sports, canoeing, kayaking and backpacking, extreme sports (e.g., hang-gliding), biking, rock and ice climbing, sailing, windsurfing and scuba diving. However, they were also more likely than the average traveller to participate in viewing natural phenomena (e.g., whale-watching) and natural sightseeing (e.g., viewing wildlife and wild flora), indicating their keen interest in nature.

Those who had sought out a hands-on learning experience while on vacation during the past two years were also more likely to have camped, stayed in a wilderness lodge or remote fly-in lodge or outpost, again reflecting their interest in nature. They were also much more likely than the average traveller to have gone to a cooking or wine tasting school, or to have stayed in a B&B, health spa or gourmet restaurant with accommodations, which often afford opportunities to learn.

This sector of the market plans their vacations carefully, consulting a broad array of information sources. They can be reached most efficiently through print advertising (e.g., travel section of newspapers, travel magazines, direct mail, travel guides).

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# Background

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An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years, or expressed interest in travel in the next two years, were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines people who exhibited an interest in participating in a hands-on learning experience (such as an archaeological dig, cooking course, learning another language) while on vacation during the past two years, as well as people who expressed an interest in this type of vacation experience. The TAMS database was used to identify sectors of the market that sought out a hands-on learning experience while on vacation during the past two years, as well as those who exhibited an interest in participatory learning vacation experiences. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in hands-on learning vacation experiences. The report also provides an Overall Market Potential of each segment of the market. This identifies the segments that offer the best potential for marketing, advertising and promotional activities designed to promote opportunities to participate in hands-on learning experiences while vacationing in Canada and Ontario.

# Hands-On Learning on Vacation

# Interest Index

## Construction of the Index

The TAMS Mailback Survey contained two items specifically associated with hands-on learning experiences while on vacation. These were:

- Whether the respondent had participated in a hands-on learning experience (archaeological dig, cooking course, learning another language) while on vacation during the past two years
- Whether the respondent expressed an interest in participating in a hands-on learning experience while on vacation during the next two years.

Based on the responses to these two questions, the TAMS respondents were classified into three groups:

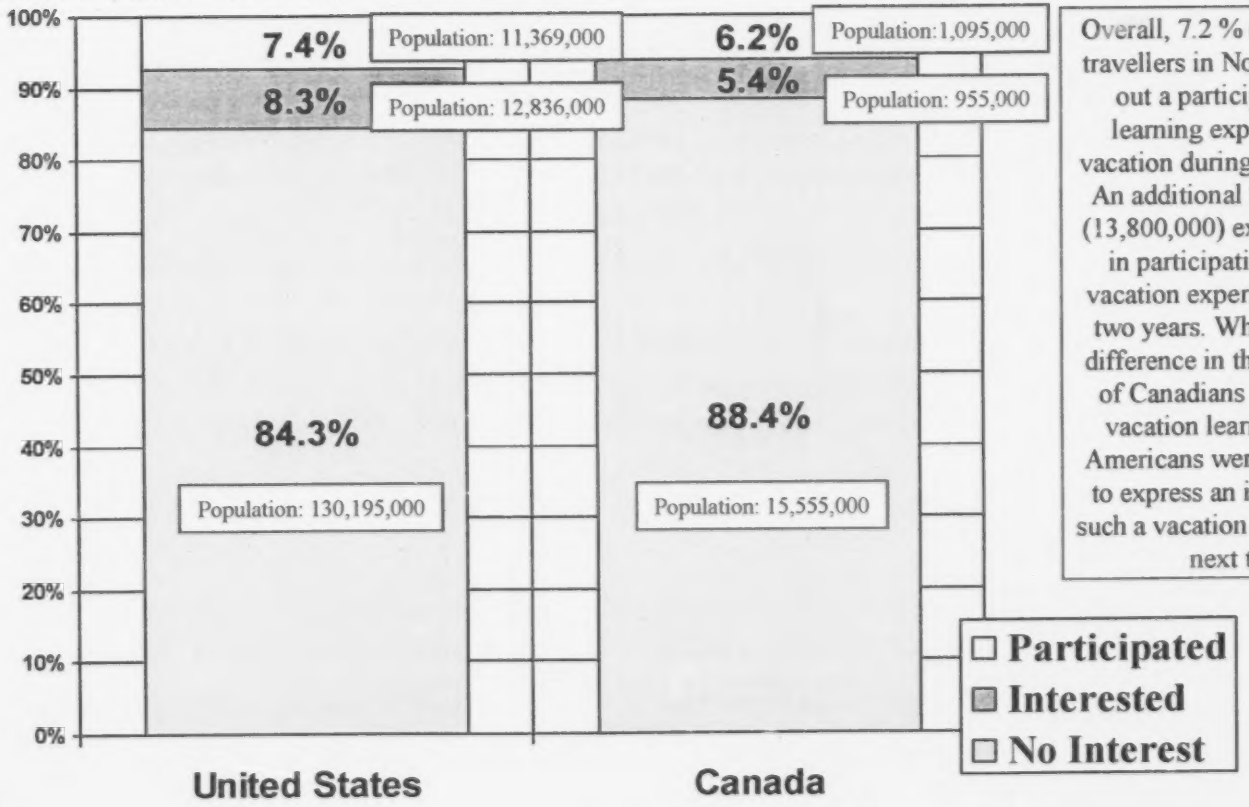
- No Interest: Did not participate in a hands-on learning experience while on vacation during the past two years, nor expressed plans to participate in a hands-on learning experience over the next two years
- Interested: Did not participate in a hands-on learning experience while on vacation during the past two years, but did express plans to participate in a hands-on learning experience over the next two years
- Participated: Did participate in a hands-on learning experience while on vacation during the past two years, irregardless of whether or not they expressed plans to participate in a hands-on learning experience over the next two years.

# Interest in Hands-On Learning on Vacation

## Canada versus United States

### Based on Prior Travel Activities and Future Interest

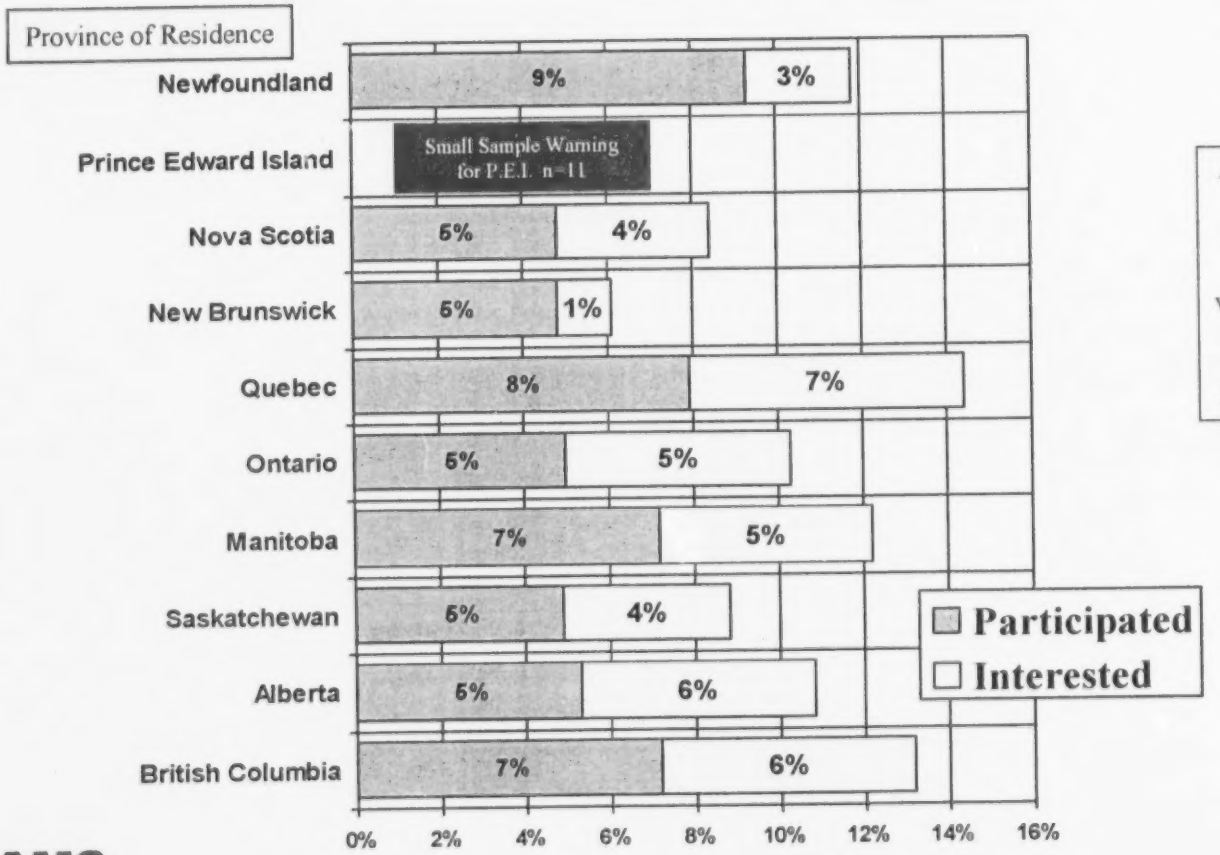
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




Overall, 7.2 % (12,140,000) of the travellers in North America sought out a participatory hands-on learning experience while on vacation during the past two years. An additional 8.0 % of travellers (13,800,000) expressed an interest in participating in this type of vacation experience over the next two years. While there was little difference in the participation rate of Canadians and Americans in vacation learning experiences, Americans were 53 % more likely to express an interest in pursuing such a vacation experience over the next two years.

# Interest in Hands-On Learning on Vacation:
## Based on Prior Travel Activities & Future Interest
## Canada: By Province

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




Among Canadians, residents of Newfoundland had the highest rate of participation in hands-on learning vacations, although there was relatively little variation in the participation rate or interest level across Canada.

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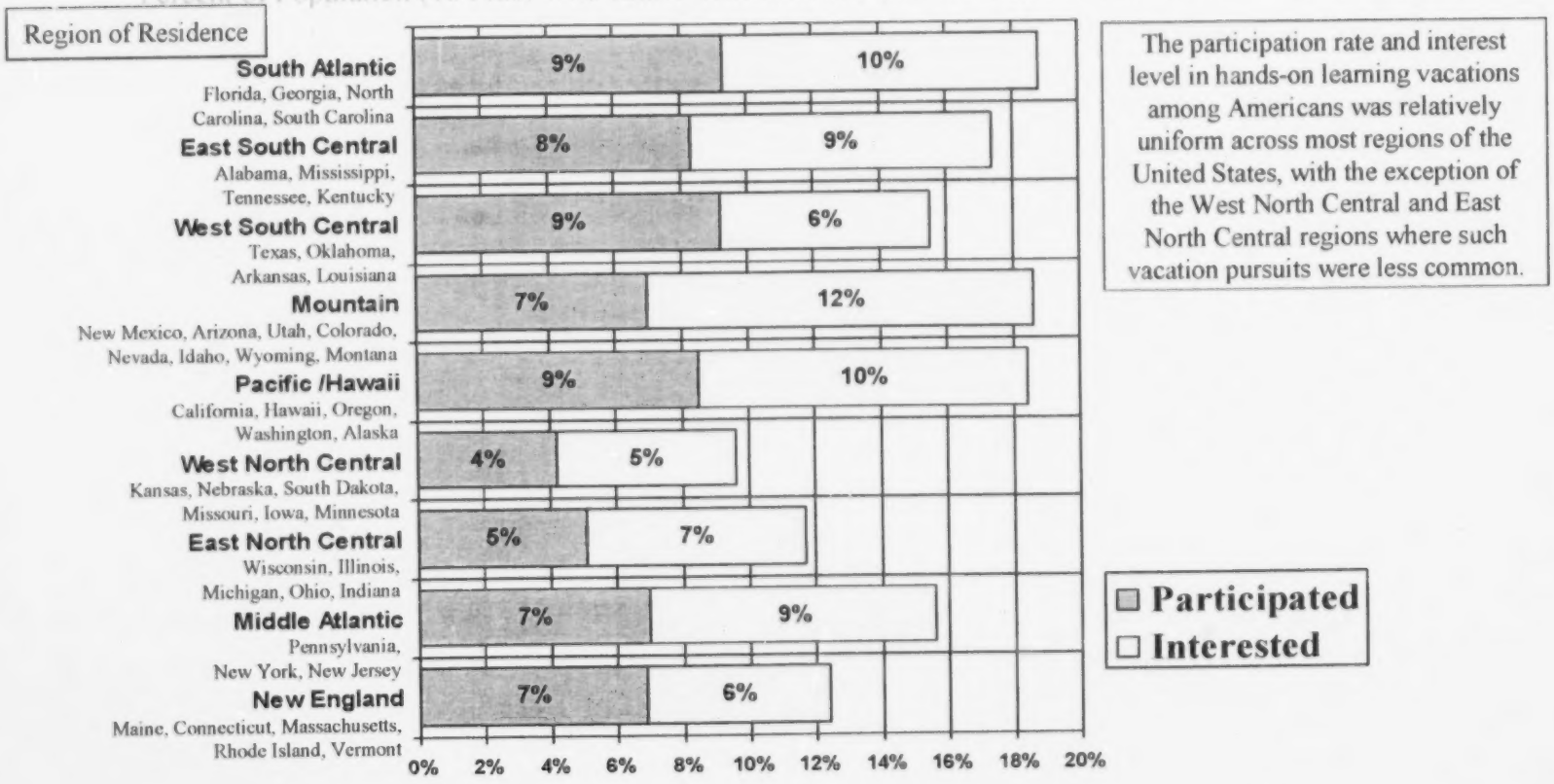
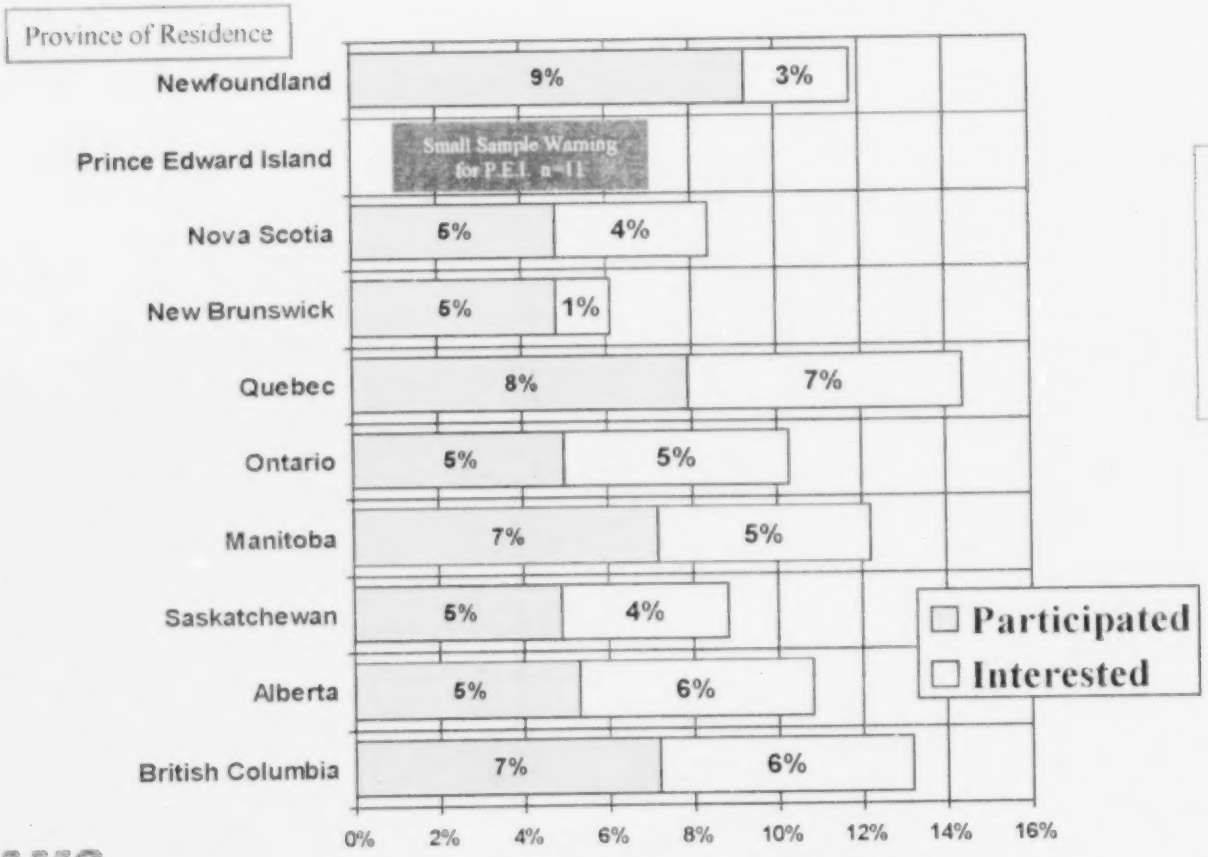
# Interest in Hands-On Learning on Vacation:
## Based on Prior Travel Activities & Future Interest
# United States: By Region

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




The participation rate and interest level in hands-on learning vacations among Americans was relatively uniform across most regions of the United States, with the exception of the West North Central and East North Central regions where such vacation pursuits were less common.

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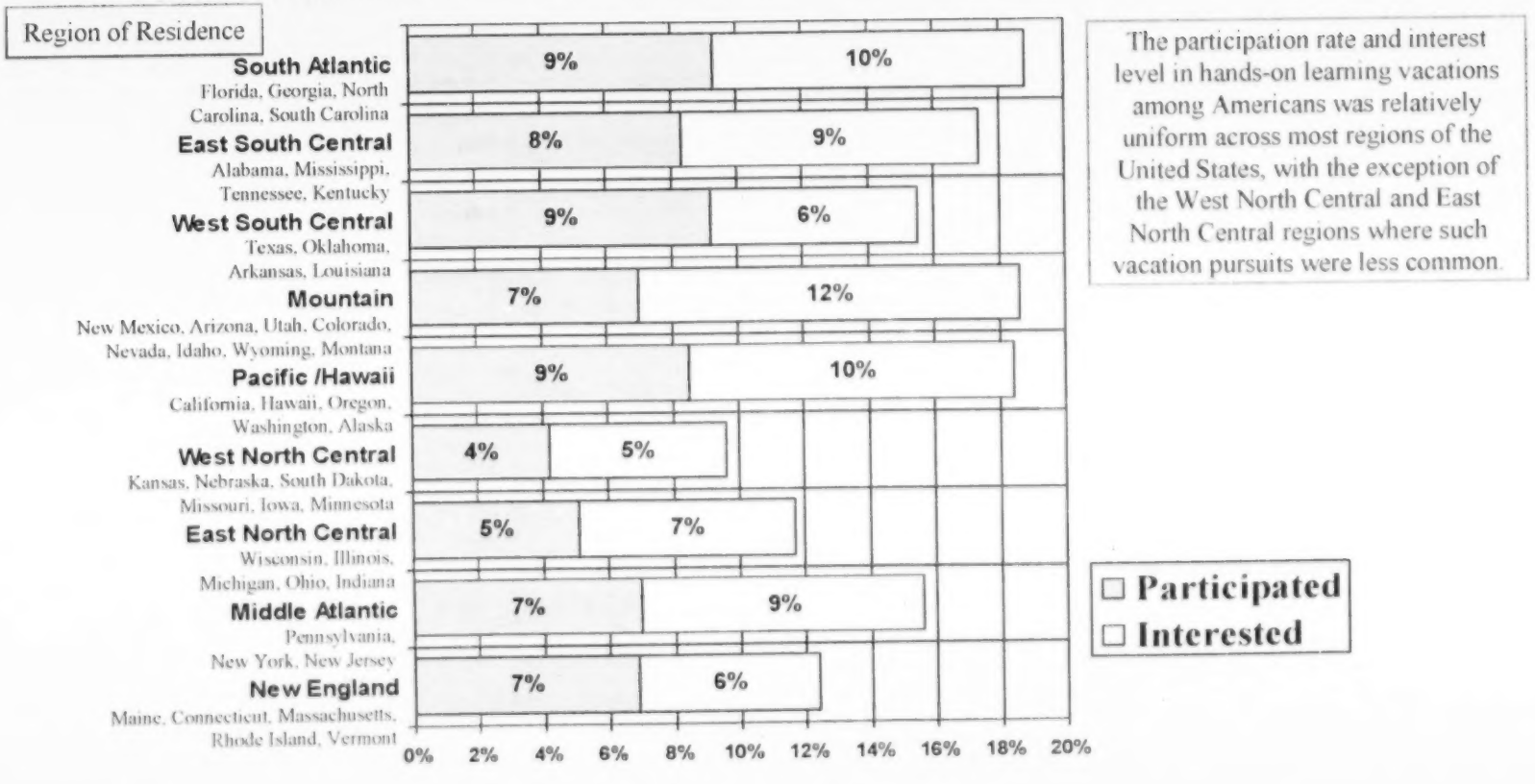


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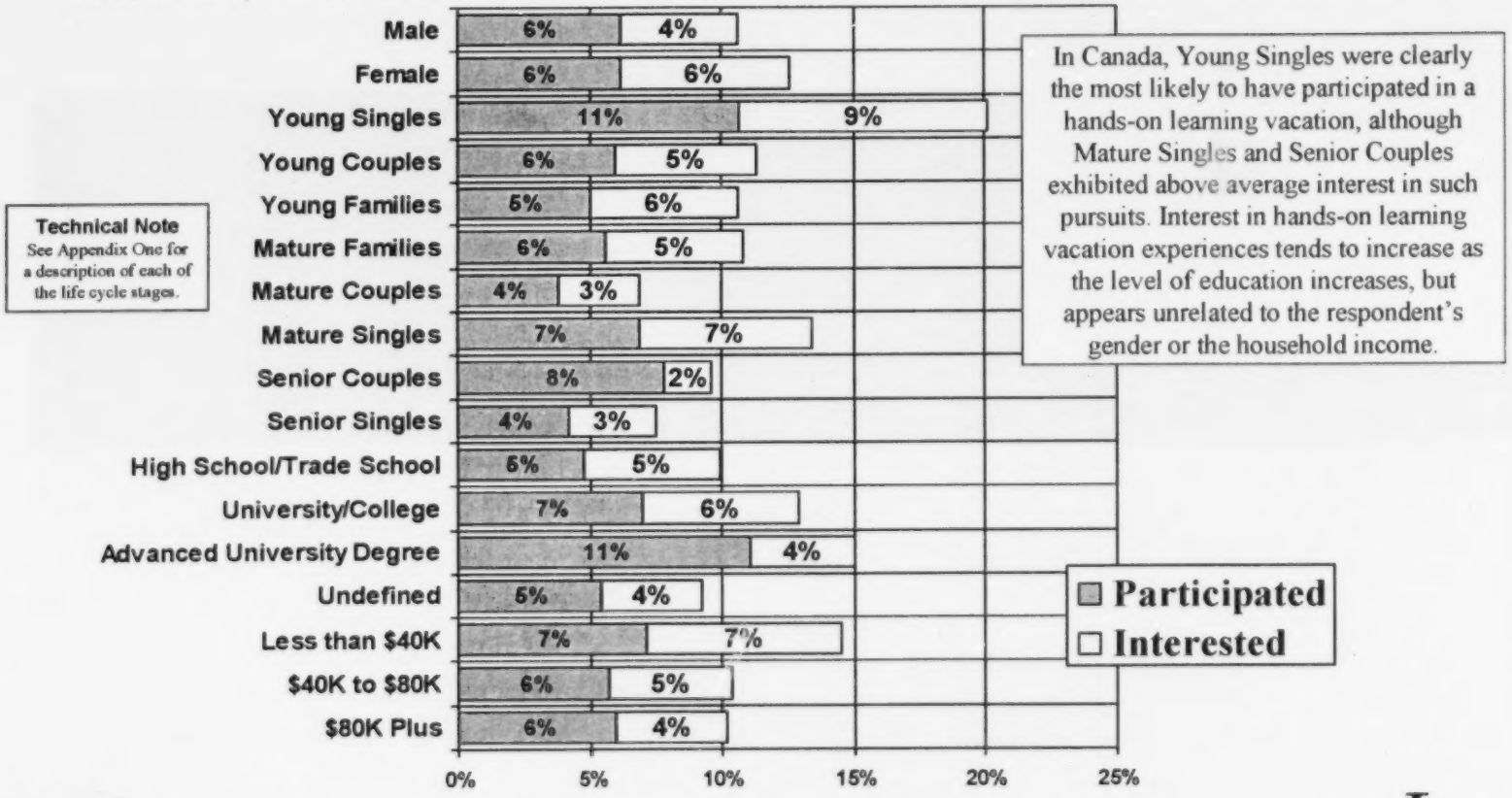
# Interest in Hands-On Learning on Vacation

## Canada: By Demographics

### Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




**Technical Note**
See Appendix One for a description of each of the life cycle stages.

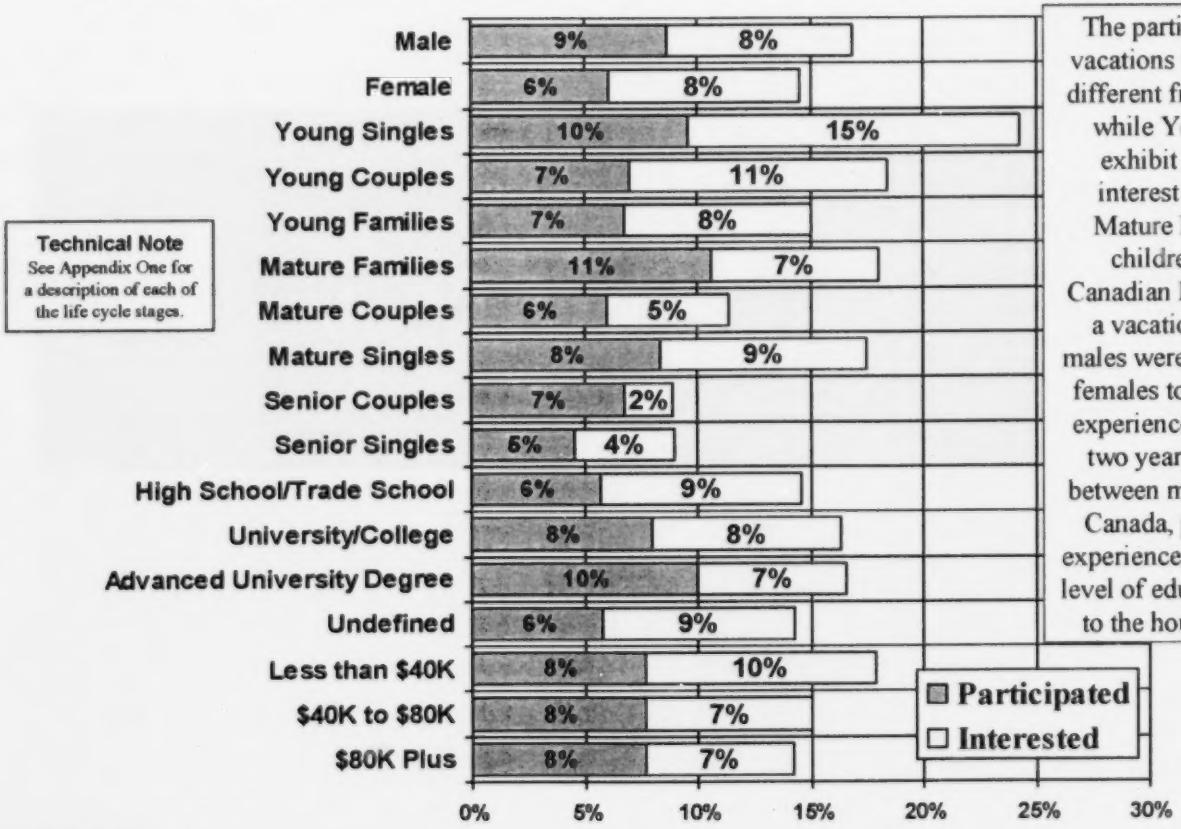
In Canada, Young Singles were clearly the most likely to have participated in a hands-on learning vacation, although Mature Singles and Senior Couples exhibited above average interest in such pursuits. Interest in hands-on learning vacation experiences tends to increase as the level of education increases, but appears unrelated to the respondent's gender or the household income.

# Interest in Hands-On Learning on Vacation

## United States: By Demographics

### Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

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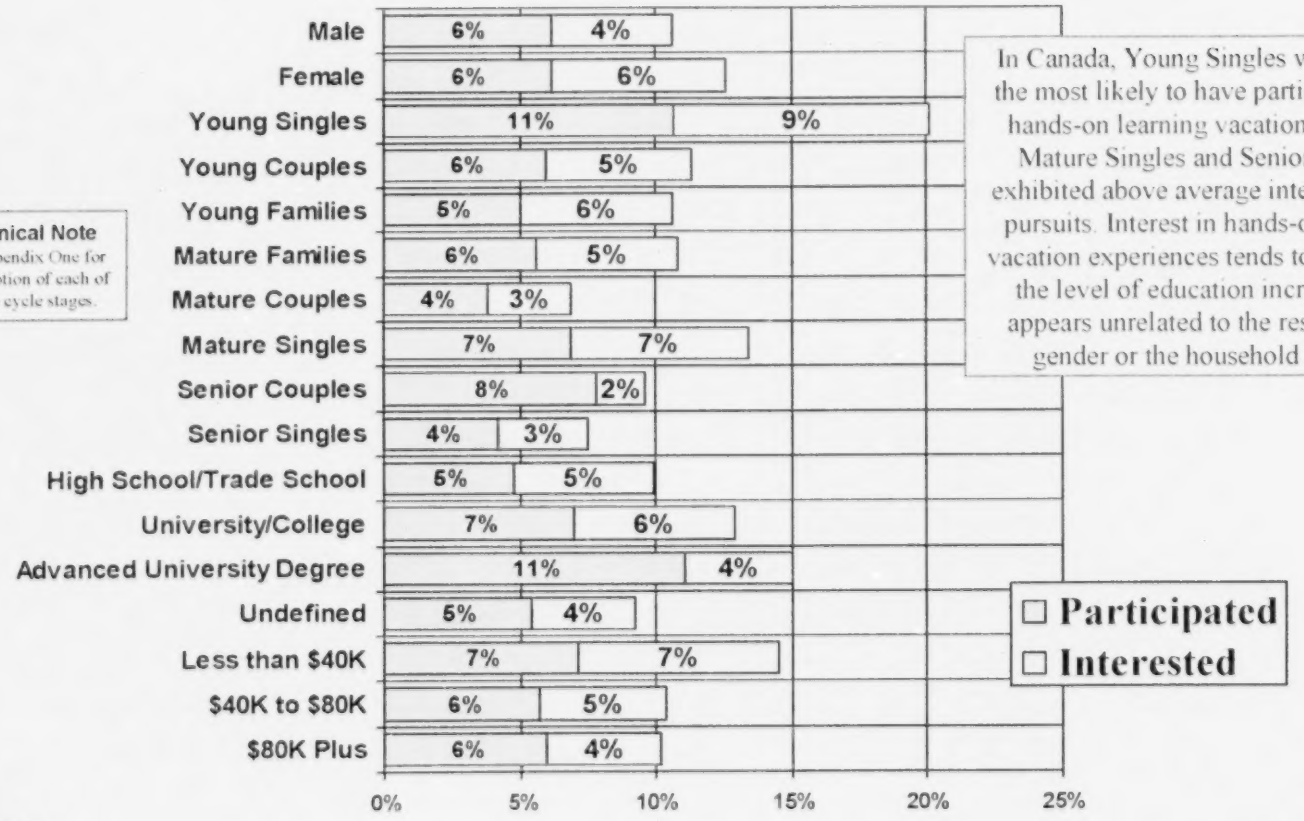
See Appendix One for a description of each of the life cycle stages.

The participation rate in hands-on learning vacations in the United States was somewhat different from that observed in Canada. Thus, while Young Singles and Mature Singles exhibit above average participation and interest levels (as in Canada), American Mature Families (i.e., those with teenage children) were much more likely than Canadian Mature Families to have taken such a vacation in the past. As well, American males were 42.6 % more likely than American females to have pursued a hands-on learning experience while on vacation during the past two years. (Note: There was no difference between males and females in Canada). As in Canada, participation in hands-on learning experiences while on vacation increased as the level of education increased, but was unrelated to the household income of the respondent.

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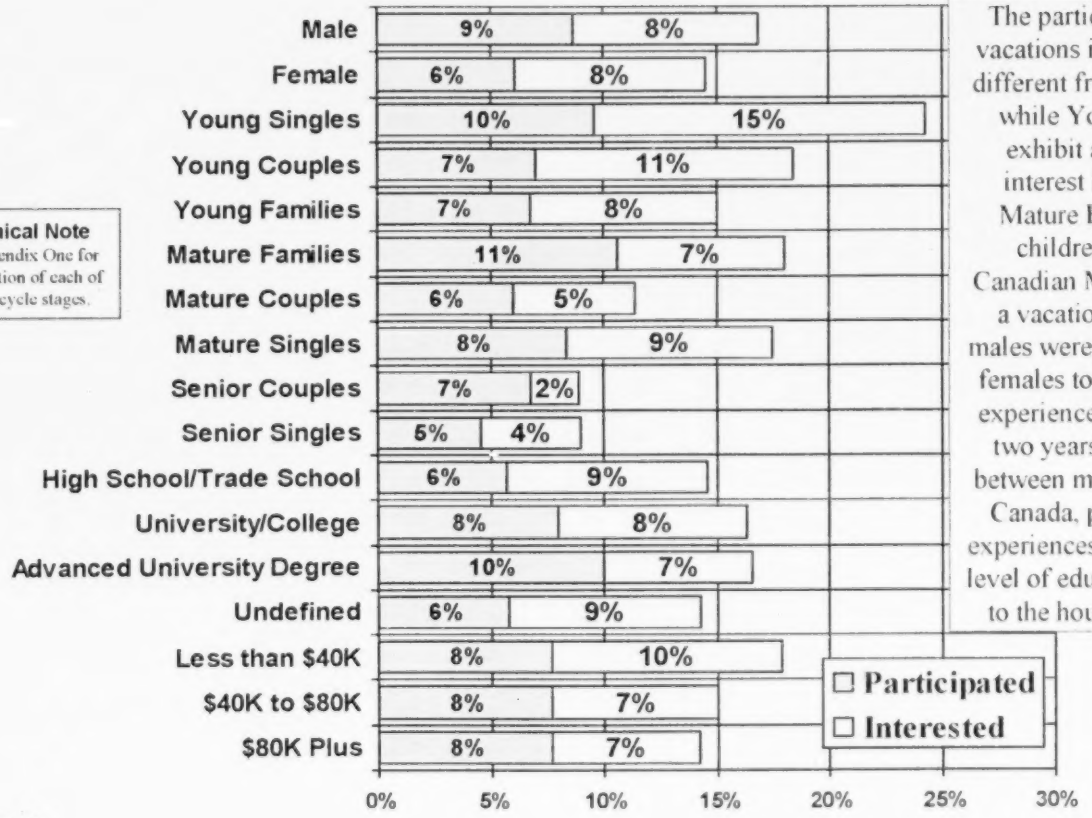
*TAMS: Hands-On Learning While on Vacation*

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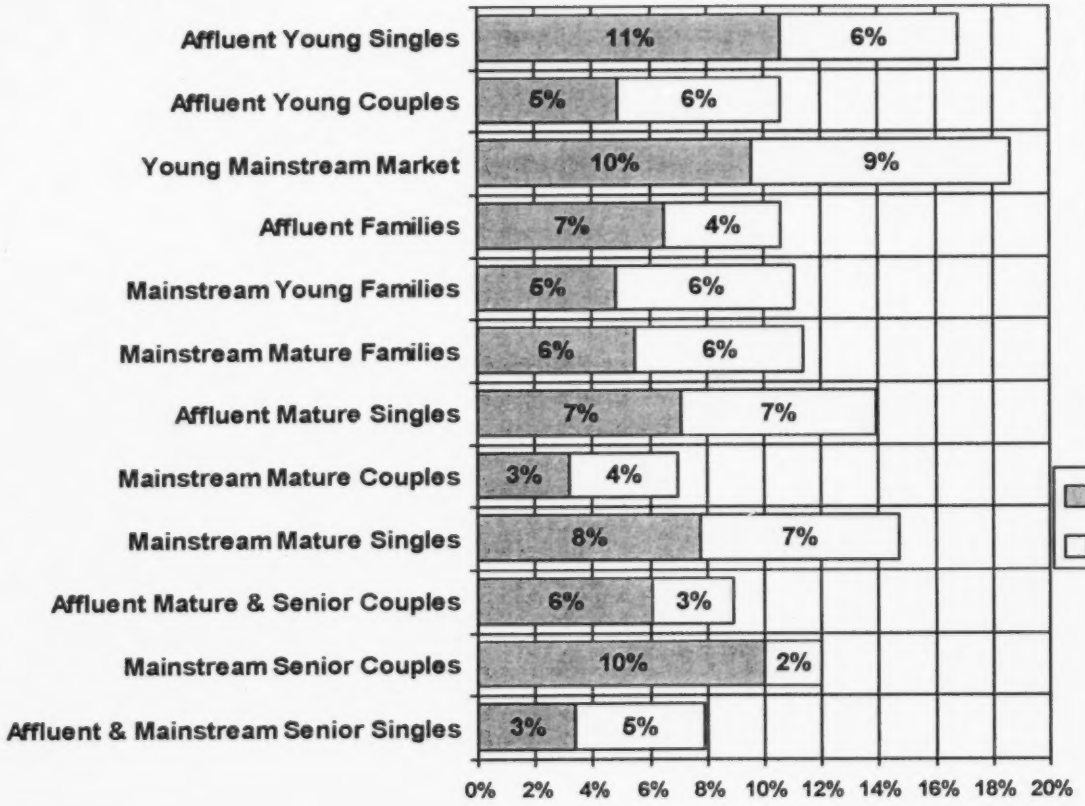
# Interest in Hands-On Learning on Vacation
# Canada: By Market Segment
## Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




In terms of the market segments (see technical notes) in Canada, Affluent Young Singles were the most likely to have participated in a hands-on learning experience while on vacation, followed by the Young Mainstream Market and Mainstream Senior Couples. Interest in these types of vacation experiences was quite high within the Young Mainstream Market. Overall, hands-on learning vacation experiences appear to appeal mostly to younger and/or single travellers.

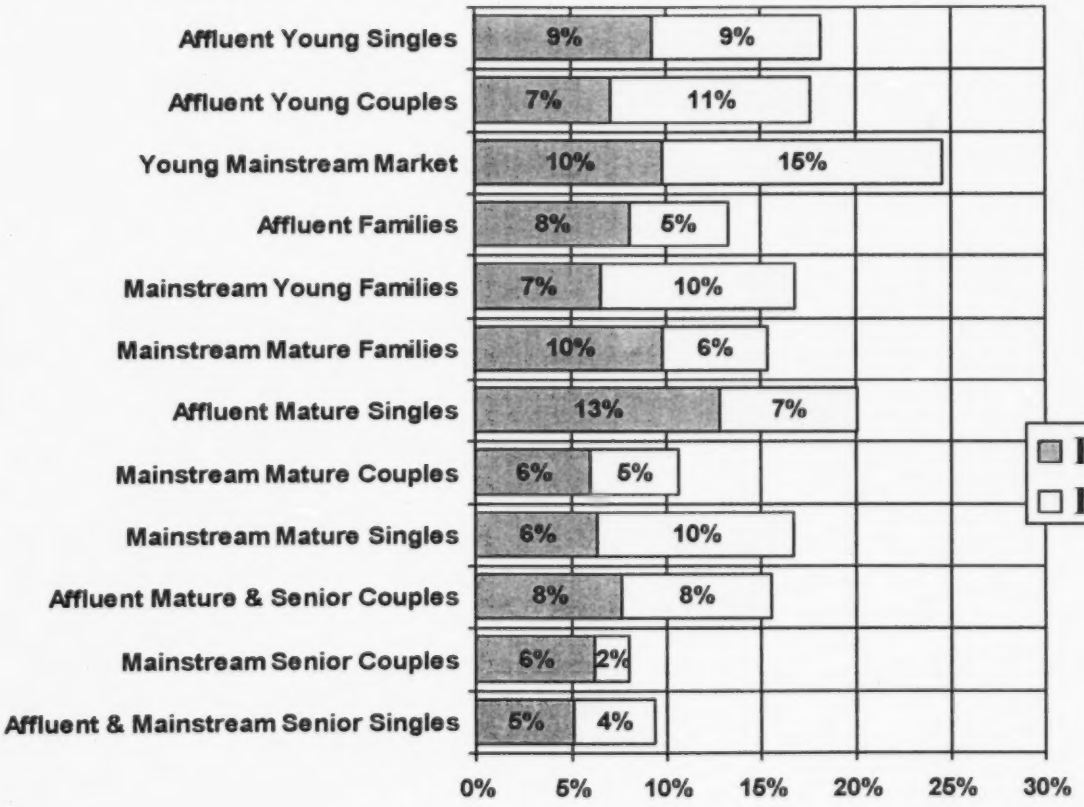
**Technical Note**
The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Hands-On Learning on Vacation

# United States: By Market Segment

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




In the United States, the market segments with the highest level of participation in hands-on learning vacations were the Affluent Mature Singles, Mainstream Mature Families and Young Mainstream Market. However, as in Canada, the overall interest level exhibited in such vacations was highest among younger and single travellers.

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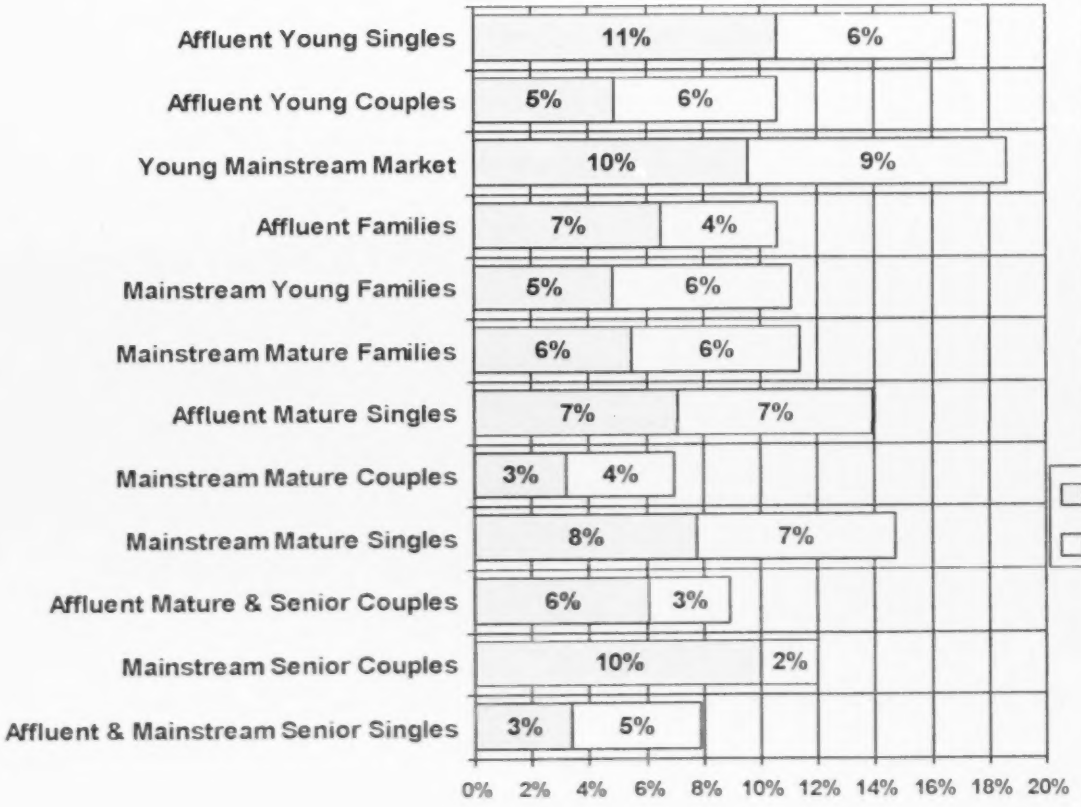


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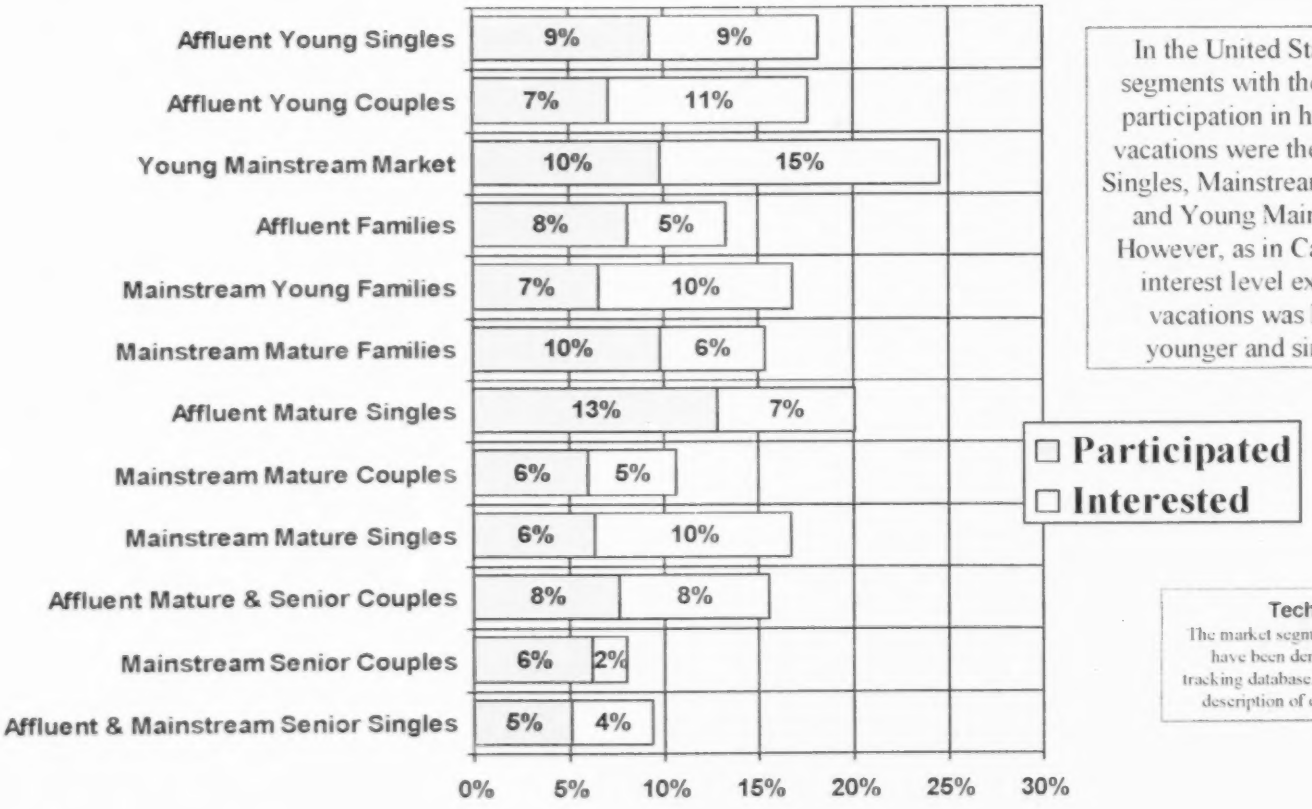


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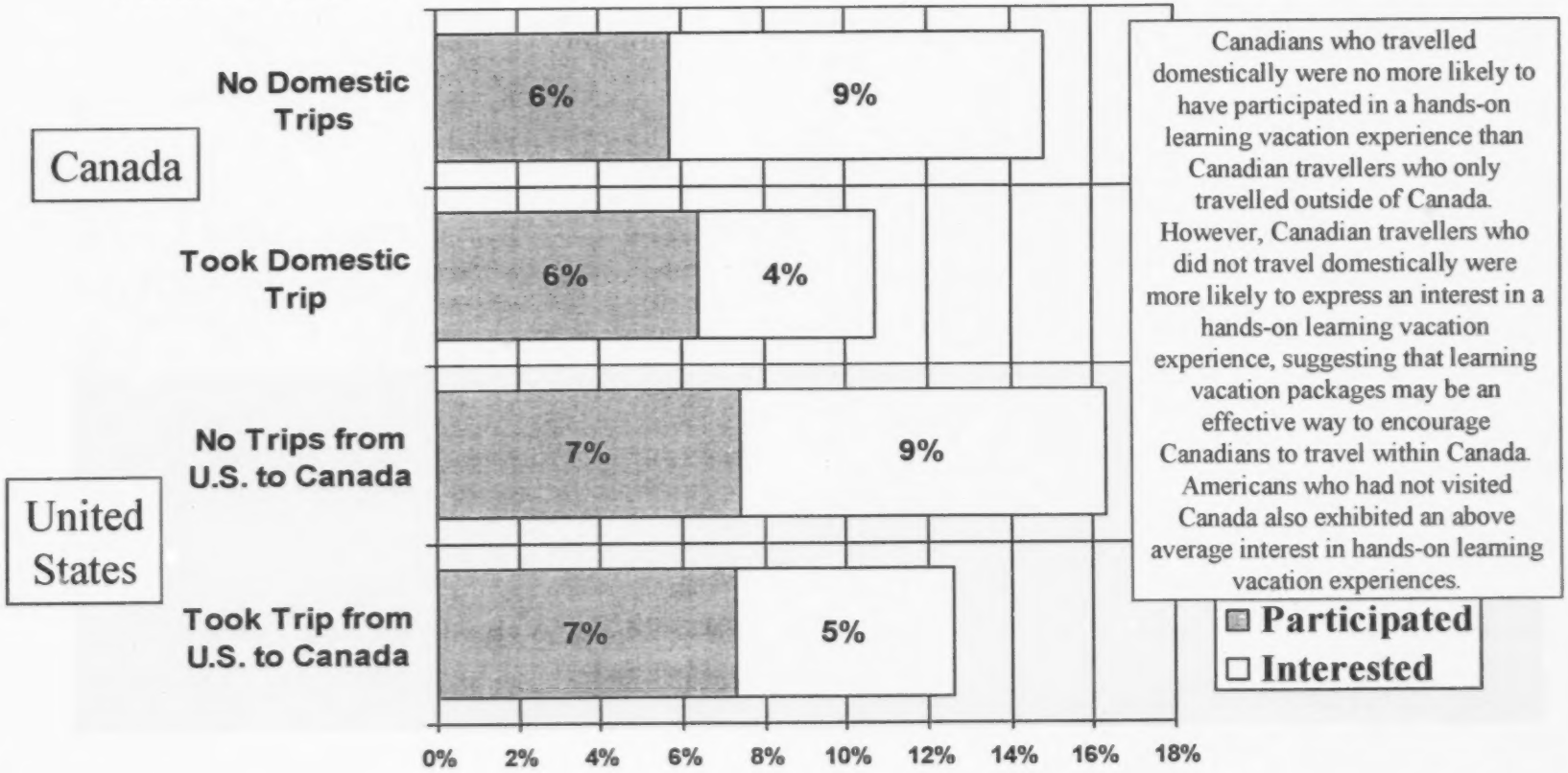
# Interest in Hands-On Learning on Vacation

## Canada vs. U.S.: By Trips In Canada Last Two Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



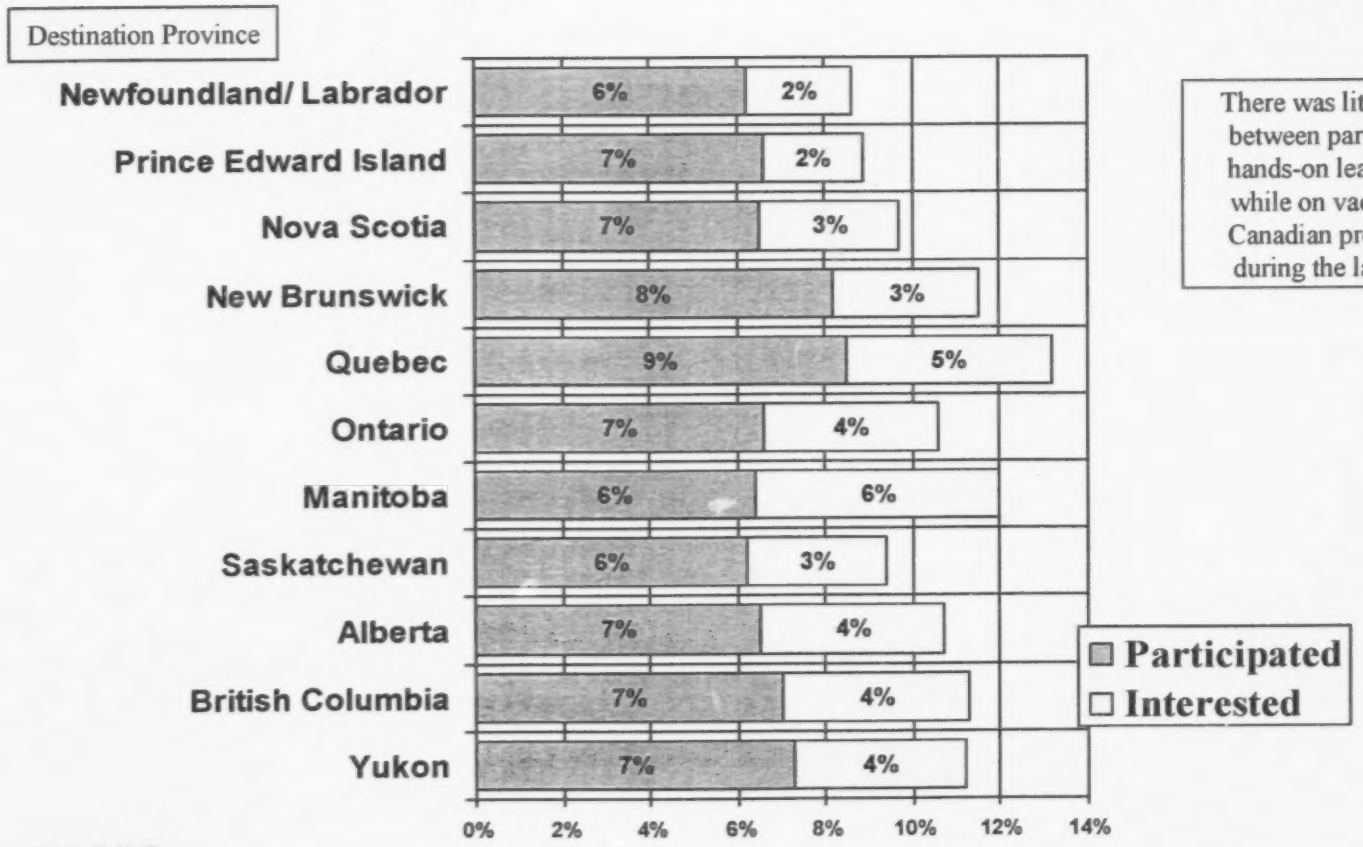

Canadians who travelled domestically were no more likely to have participated in a hands-on learning vacation experience than Canadian travellers who only travelled outside of Canada. However, Canadian travellers who did not travel domestically were more likely to express an interest in a hands-on learning vacation experience, suggesting that learning vacation packages may be an effective way to encourage Canadians to travel within Canada. Americans who had not visited Canada also exhibited an above average interest in hands-on learning vacation experiences.

Interest in Hands-On Learning on Vacation

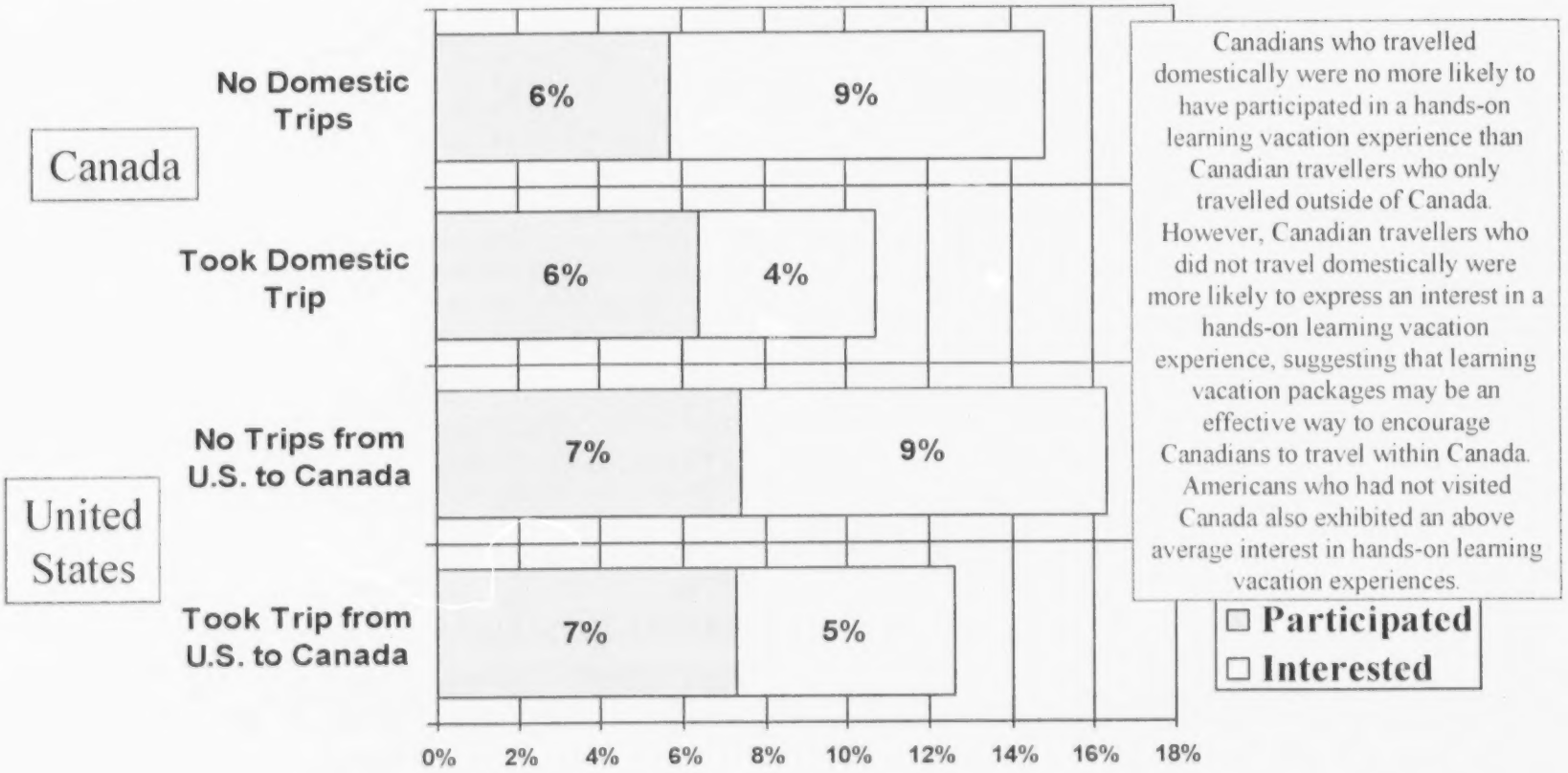
# Canada: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years




There was little association between participation in a hands-on learning activity while on vacation and the Canadian province visited during the last two years.


Canada
No Domestic Trips
6%
9%
Took Domestic Trip
6%
4%
United States
No Trips from U.S. to Canada
7%
9%
Took Trip from U.S. to Canada
7%
5%
0%
2%
4%
6%
8%
10%
12%
14%
16%
18%
Participated
Interested
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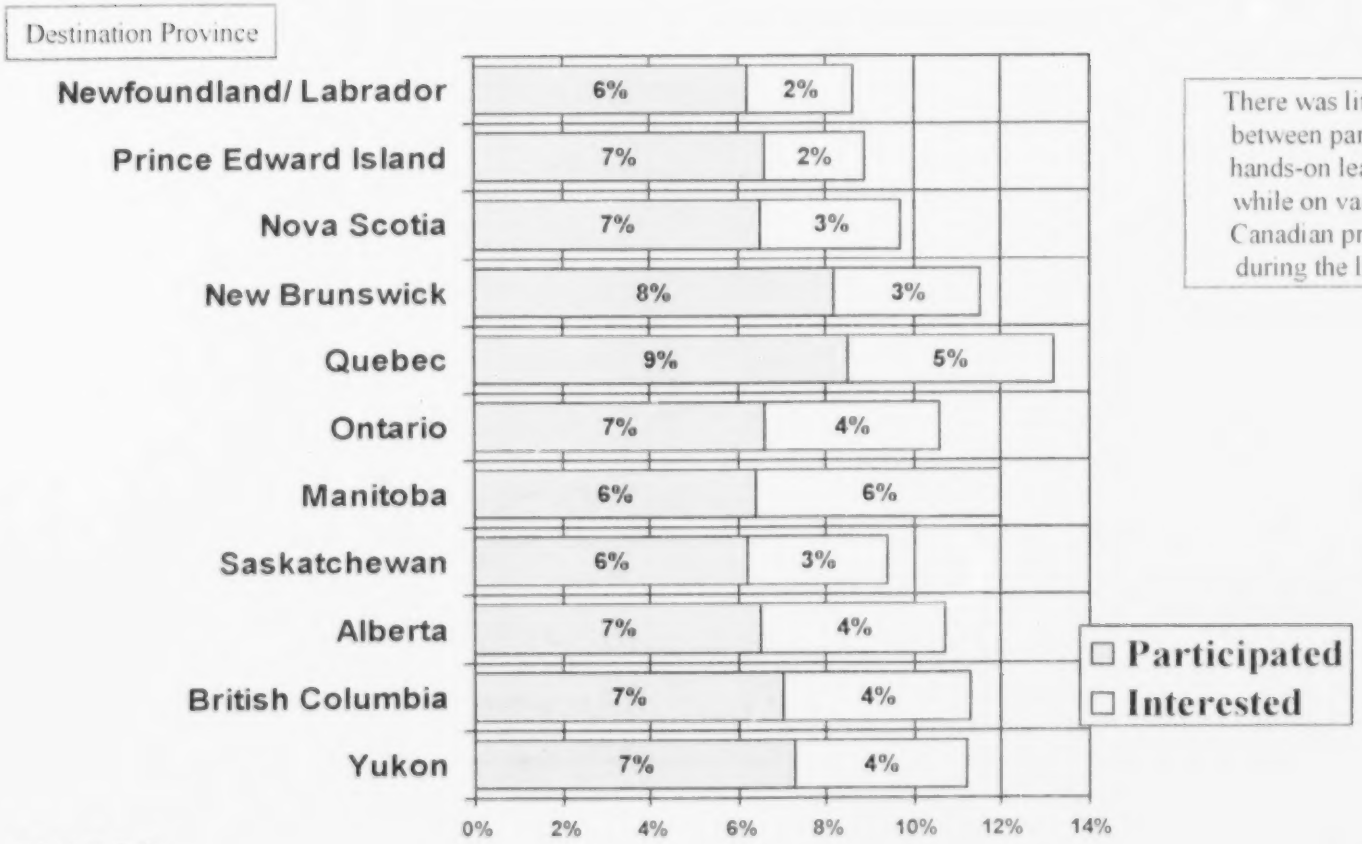


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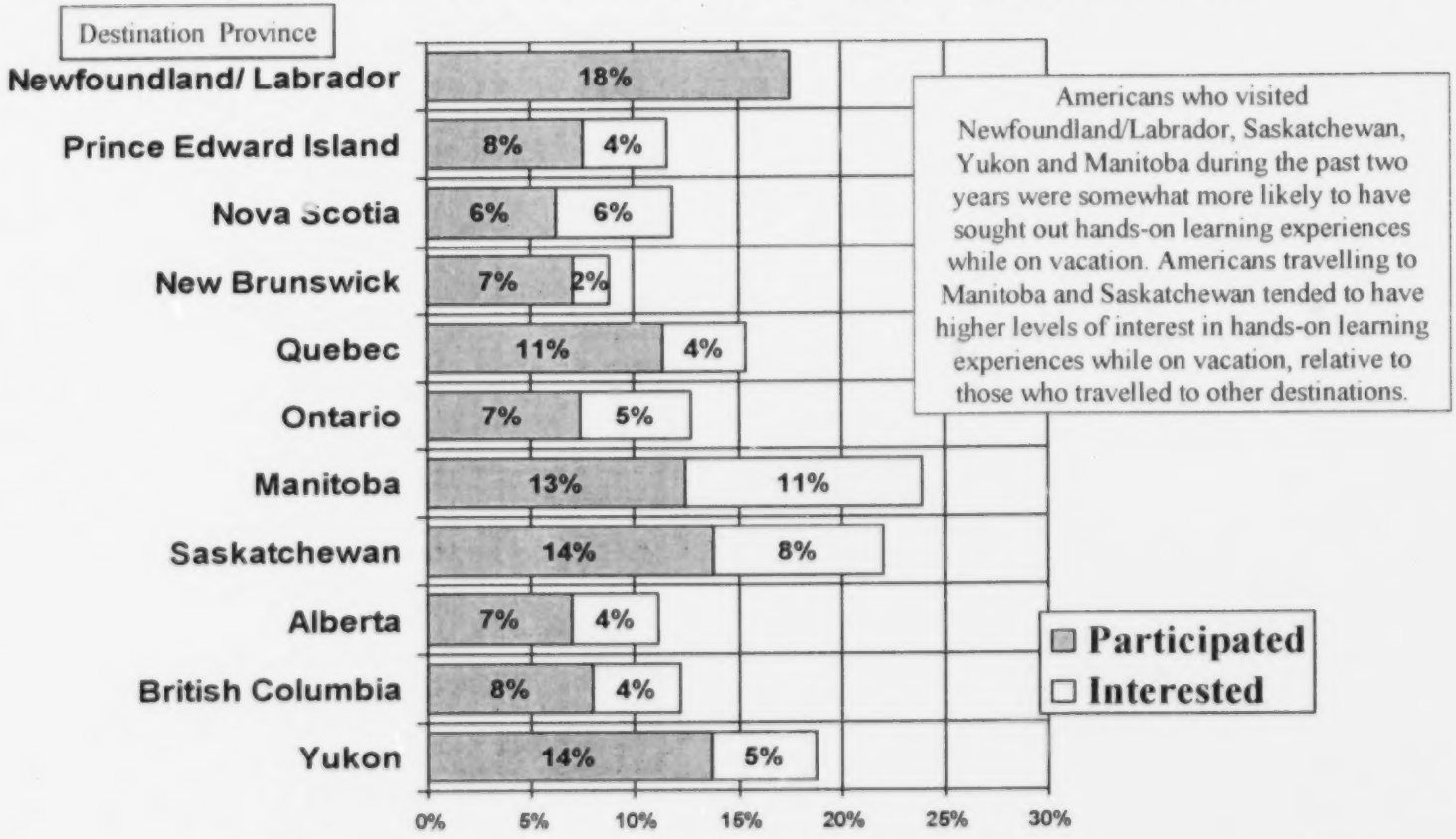
# Interest in Hands-On Learning on Vacation

## United States: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years

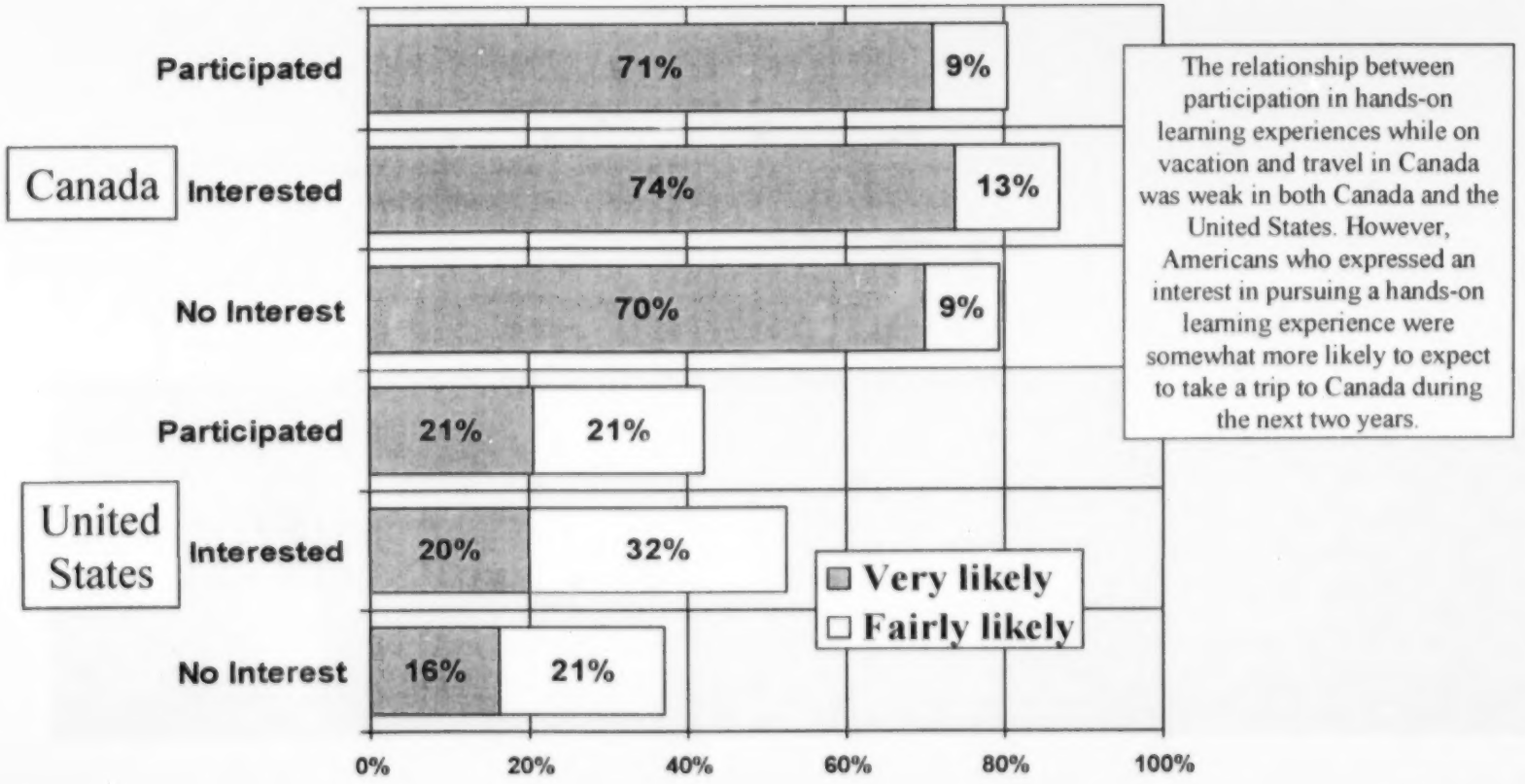


# Interest in Hands-On Learning on Vacation

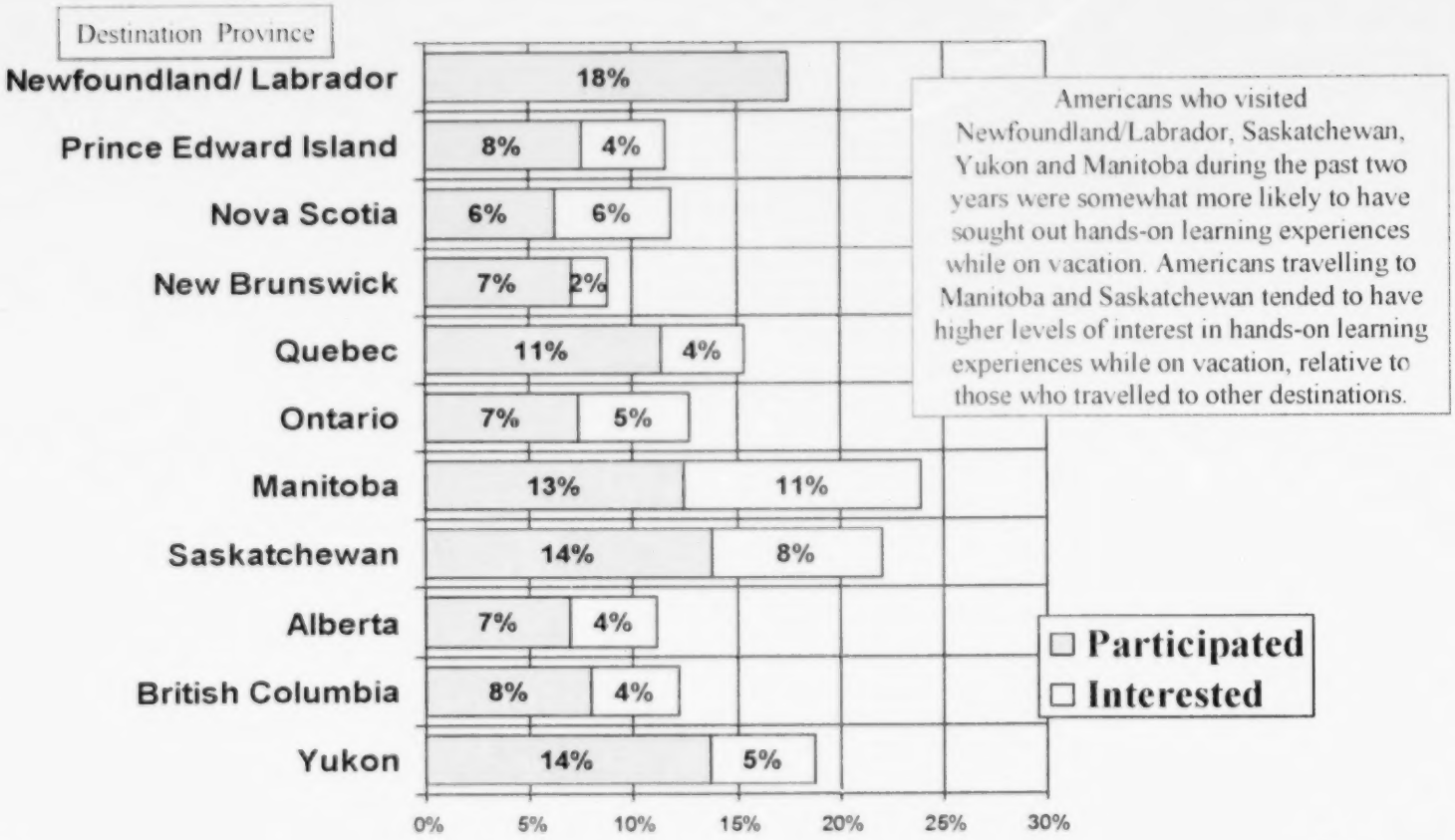
## Intentions to Travel to Canada Next Two Years

### Interest in Hands-On Learning By Intentions to Travel In Canada During Next 2 Years

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




The relationship between participation in hands-on learning experiences while on vacation and travel in Canada was weak in both Canada and the United States. However, Americans who expressed an interest in pursuing a hands-on learning experience were somewhat more likely to expect to take a trip to Canada during the next two years.

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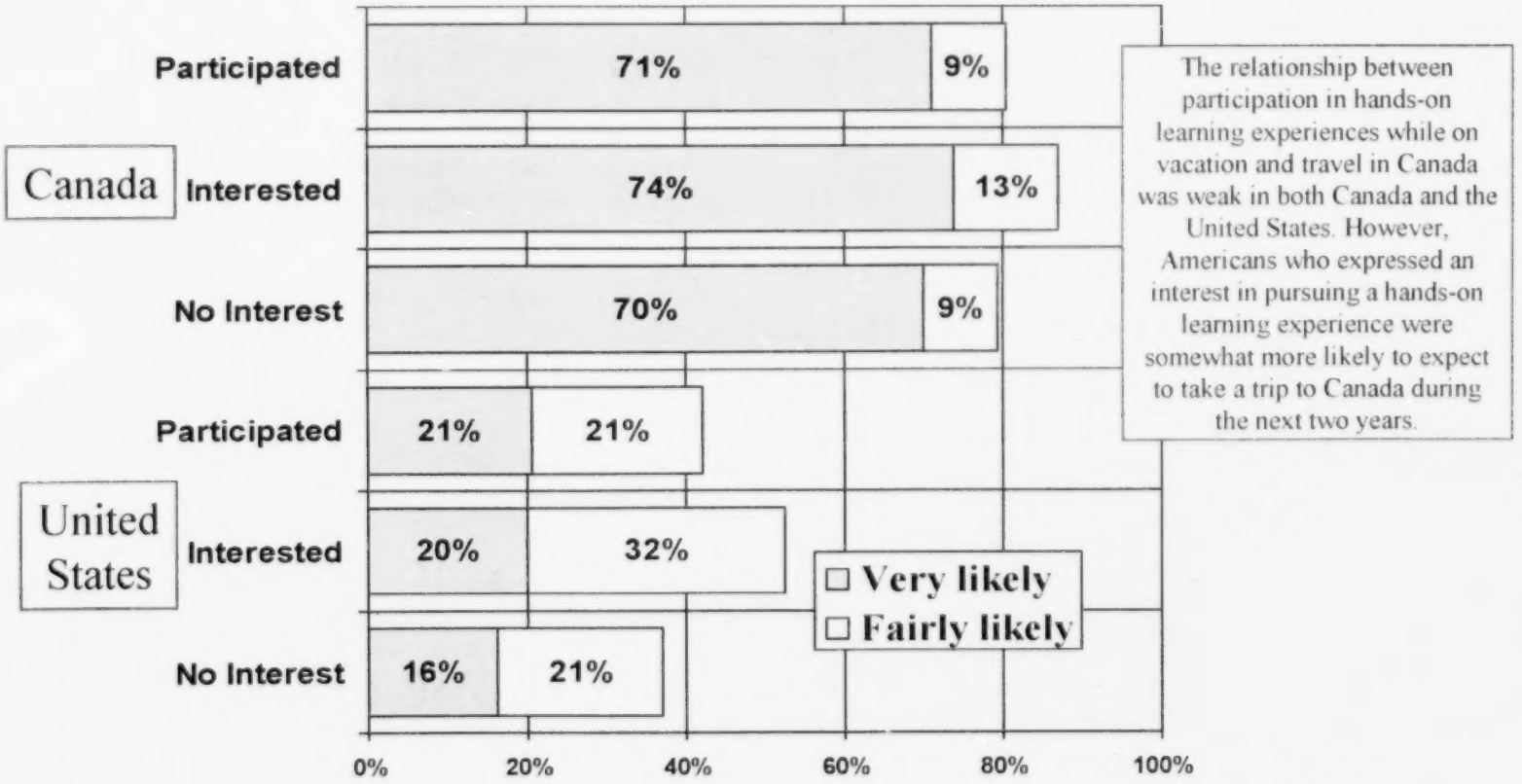


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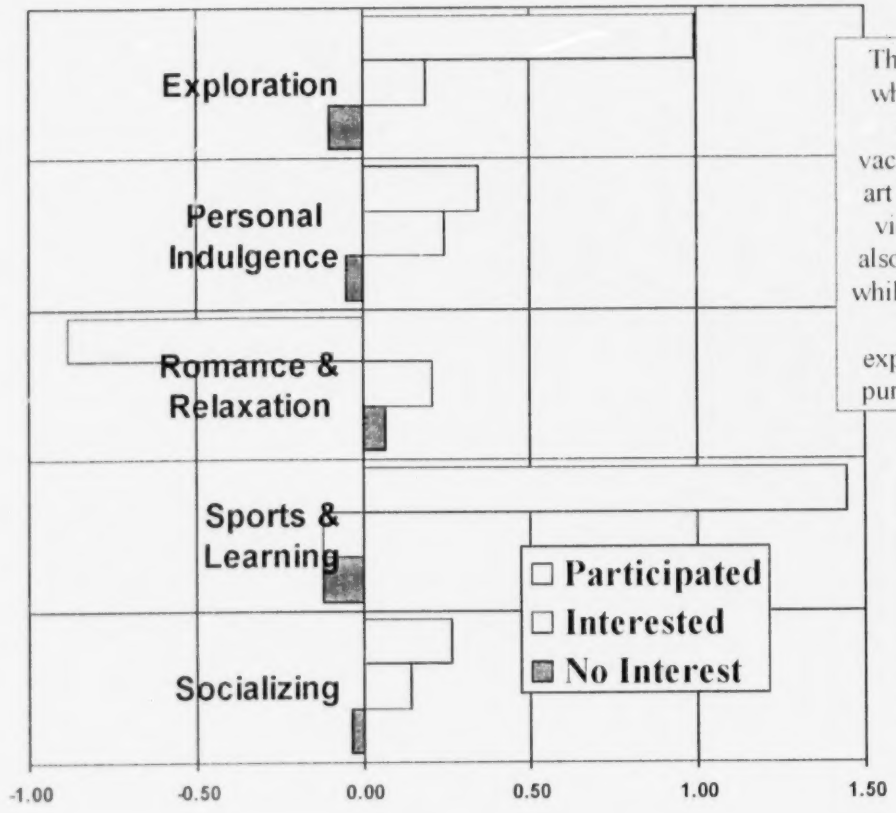


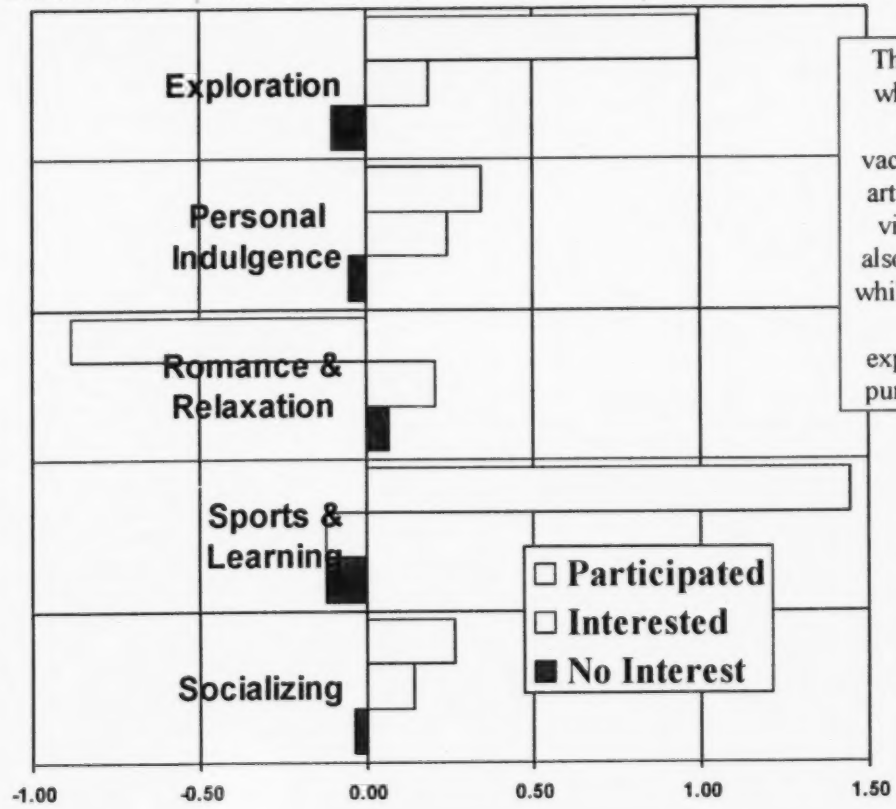

Those who sought out a hands-on learning experience while on vacation during the past two years were also much more likely to have sought out exploratory vacation activities (e.g., visiting natural sites, museums, art galleries). This suggests that these travellers tend to view vacations as an opportunity to learn. They were also more likely to have participated in a hobby or sport while on vacation during the past two years. On the other hand, those who sought out hands-on learning experiences while on vacation were much less likely to pursue vacations for romantic reasons or for relaxation.

**Technical Note**

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

# General Vacation Experiences Sought During Pleasure Travel in the Past Two Years By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



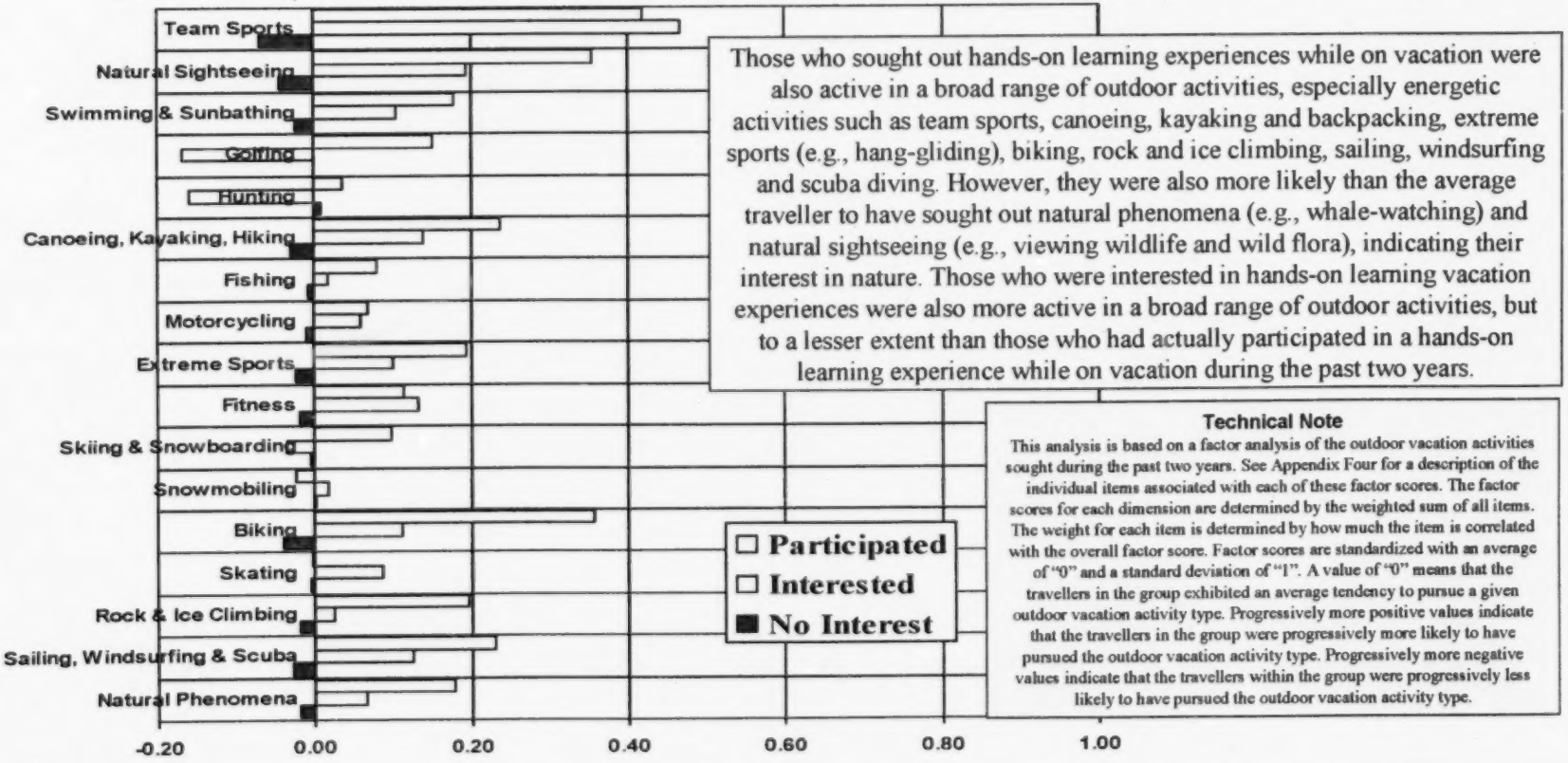

Those who sought out a hands-on learning experience while on vacation during the past two years were also much more likely to have sought out exploratory vacation activities (e.g., visiting natural sites, museums, art galleries). This suggests that these travellers tend to view vacations as an opportunity to learn. They were also more likely to have participated in a hobby or sport while on vacation during the past two years. On the other hand, those who sought out hands-on learning experiences while on vacation were much less likely to pursue vacations for romantic reasons or for relaxation.

**Technical Note**

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

# Outdoor Activities Sought During Pleasure Travel in the Past Two Years By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



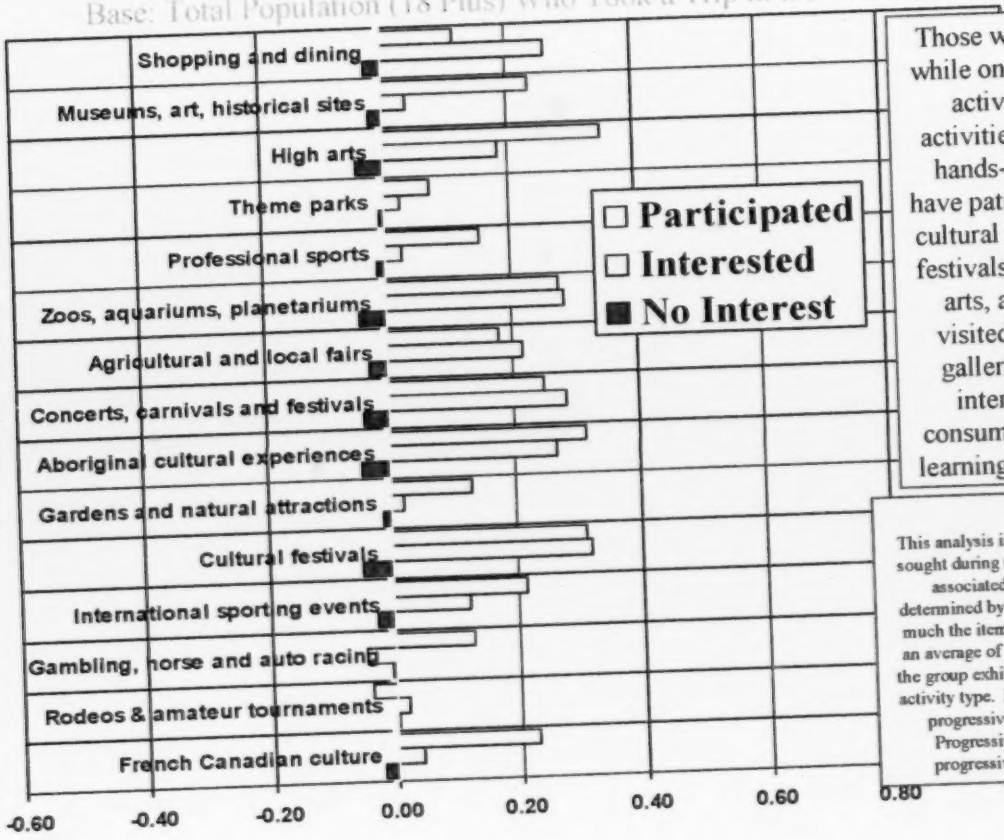

Those who sought out hands-on learning experiences while on vacation were also active in a broad range of outdoor activities, especially energetic activities such as team sports, canoeing, kayaking and backpacking, extreme sports (e.g., hang-gliding), biking, rock and ice climbing, sailing, windsurfing and scuba diving. However, they were also more likely than the average traveller to have sought out natural phenomena (e.g., whale-watching) and natural sightseeing (e.g., viewing wildlife and wild flora), indicating their interest in nature. Those who were interested in hands-on learning vacation experiences were also more active in a broad range of outdoor activities, but to a lesser extent than those who had actually participated in a hands-on learning experience while on vacation during the past two years.

**Technical Note**

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the outdoor vacation activity type.

# Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



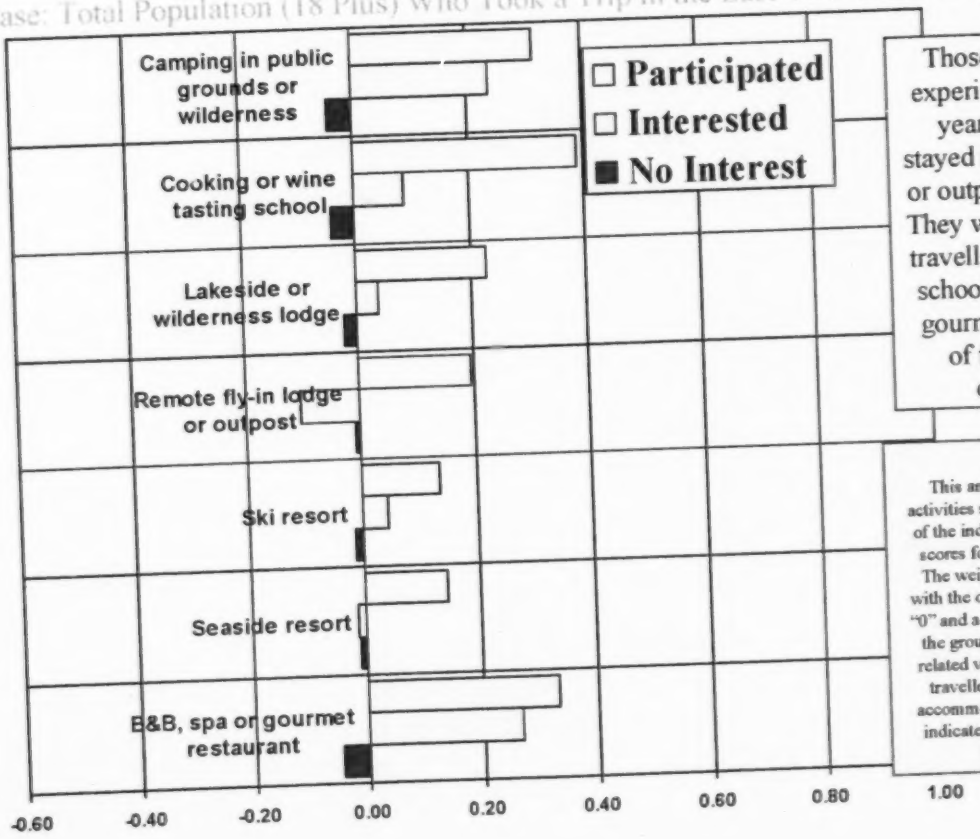

Those who had sought out a hands-on learning experience while on vacation during the past two years were also quite active in a broad array of cultural and entertainment activities. Relative to the average traveller, participants in hands-on learning experiences were especially likely to have patronized cultural activities, such as French Canadian cultural activities, aboriginal cultural activities and cultural festivals. They were also above average patrons of the high arts, and more likely than the average traveller to have visited zoos, aquariums and planetariums, museums, art galleries and historical sites, local agricultural fairs and international sporting events. This pattern of cultural consumption reflects the fact that those who seek hands-on learning experiences see vacations as opportunities to learn.

**Technical Note**

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given cultural and entertainment vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

# Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



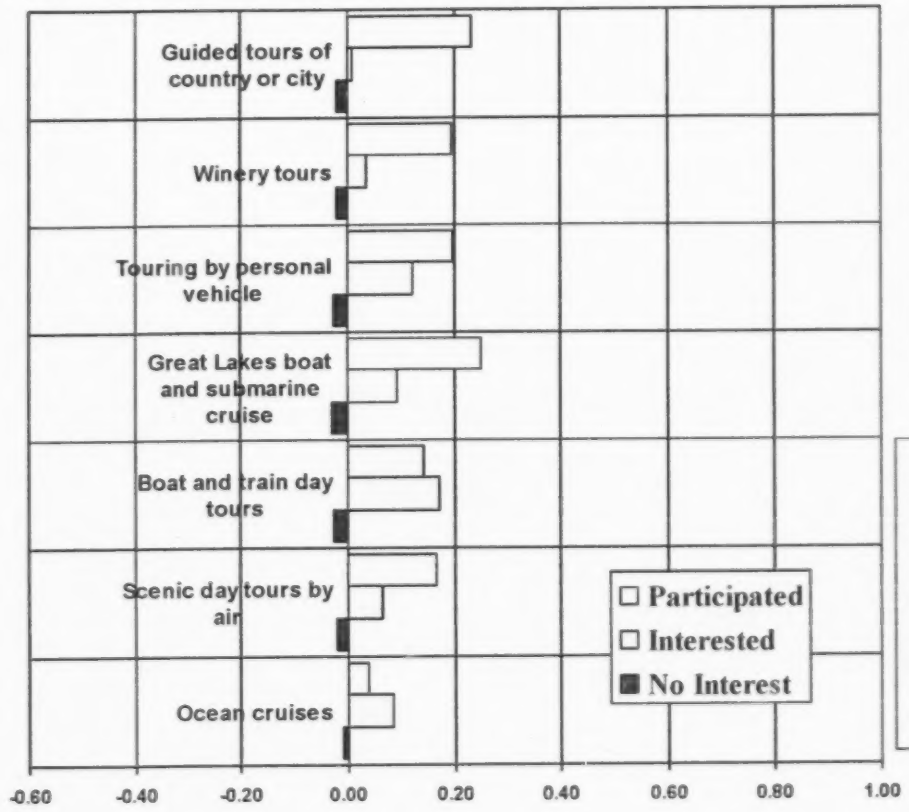

Those who had sought out a hands-on learning experience while on vacation during the past two years were also more likely to have camped, stayed in a wilderness lodge or remote fly-in lodge or outpost, again reflecting their interest in nature. They were also much more likely than the average traveller to have gone to a cooking or wine tasting school, or to have stayed in a B&B, health spa or gourmet restaurant with accommodations. Many of these types of accommodations afford an opportunity to learn while on vacation.

**Technical Note**

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

# Day & Overnight Touring Activities in the Past Two Years By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



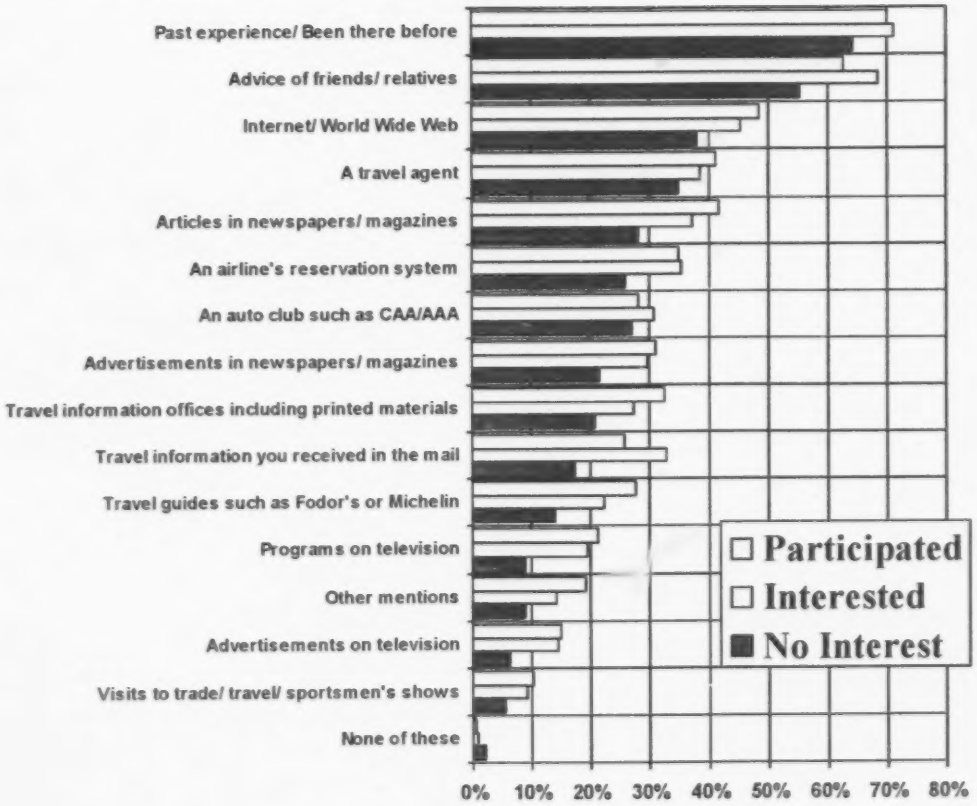

Those who had sought out a hands-on learning experience while on vacation were somewhat more likely than the average traveller to have taken day and overnight tours. However, the level of participation in most types of tours was only slightly greater than for the average traveller, suggesting that tours are not especially attractive to those interested in hands-on learning vacations.

**Technical Note**

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to participate in a given type of touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have participated in a given type of touring activity.

# Sources of Information Consulted to Plan Brief Vacations By Interest in Hands-On Learning on Vacation

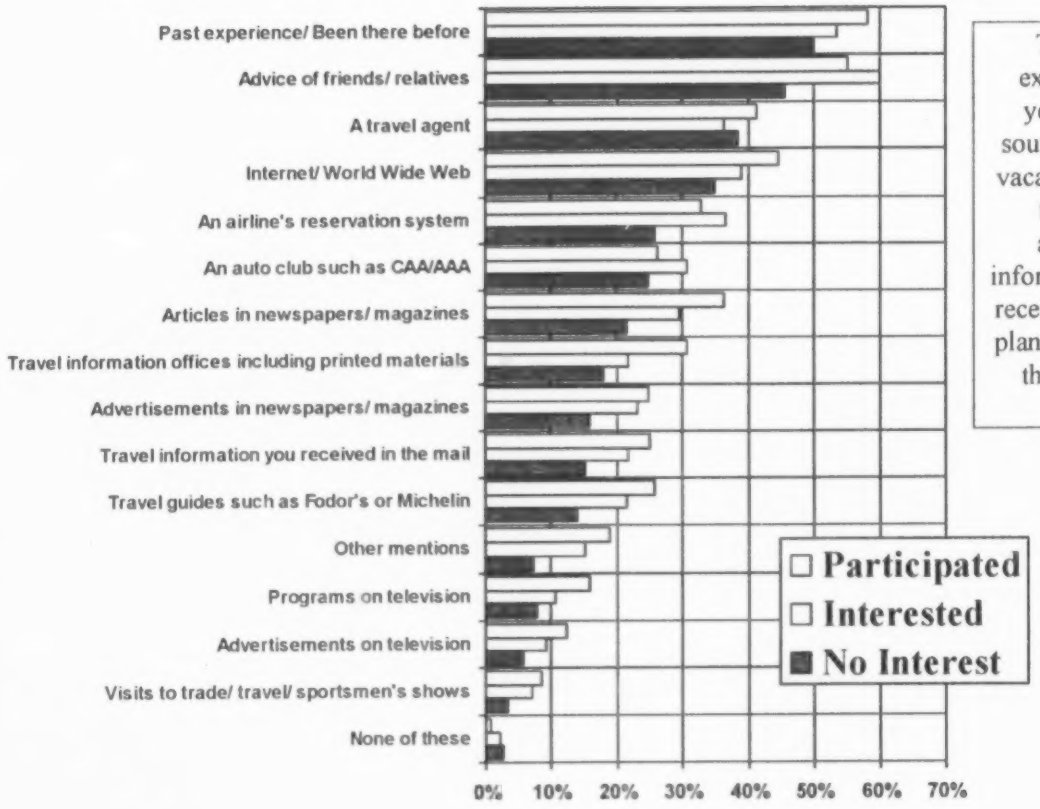
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)




Those who had sought out a hands-on learning experience while on vacation during the past two years consulted a broader array of information sources to plan their brief vacations. Relative to the average traveller, they were especially likely to have used print information (e.g., articles and advertisements in newspapers and magazines, information obtained from travel bureaus, information received in the mail, travel guides such as Fodor's), suggesting that print media may be the most efficient way to reach this sector of the market. Those who exhibited an interest in hands-on learning vacation experiences tended to consult the same type of information sources as actual participants, but were slightly more likely to rely on the advice of family and friends, and direct mail materials.

# Sources of Information Consulted to Plan Longer Vacations By Interest in Hands-On Learning on Vacation

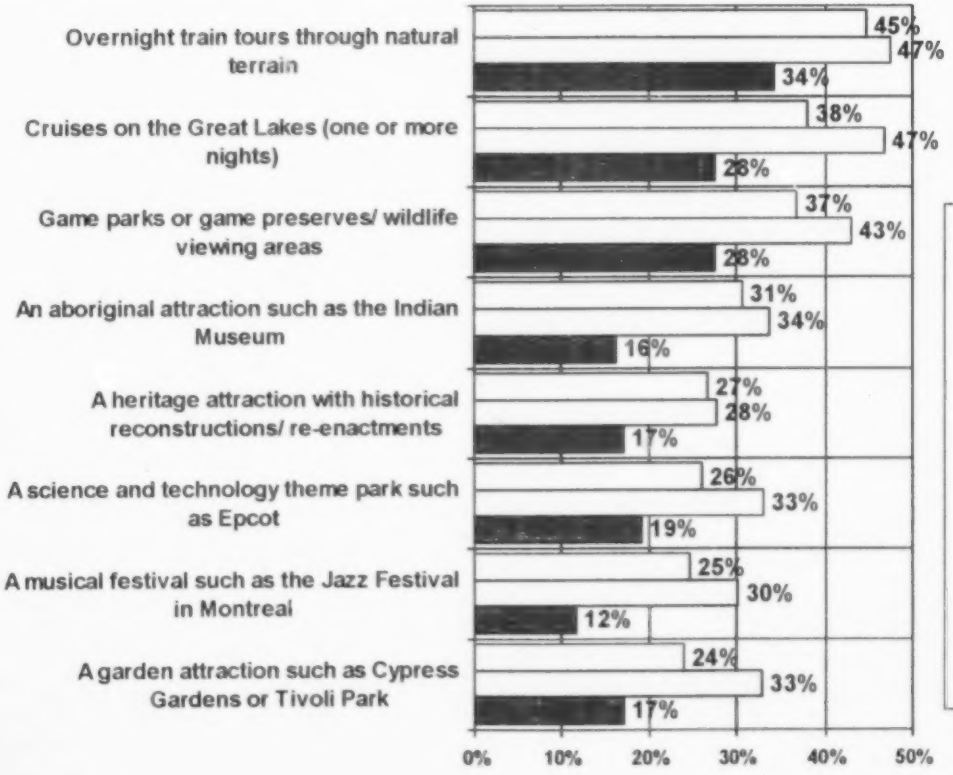
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)




Those who had sought out a hands-on learning experience while on vacation during the past two years also consulted a wide array of information sources to plan their longer vacations. As with brief vacation planning, participants were especially likely to have used print materials (e.g., articles and advertisements in newspapers and magazines, information obtained from travel bureaus, information received in the mail, travel guides such as Fodor's) to plan their longer vacations. Once again, this indicates that this sector of the market can best be reached through print advertising and direct mail.

# Interest in New Tourism Products
## By Interest in Hands-On Learning on Vacation (Part One of Two)

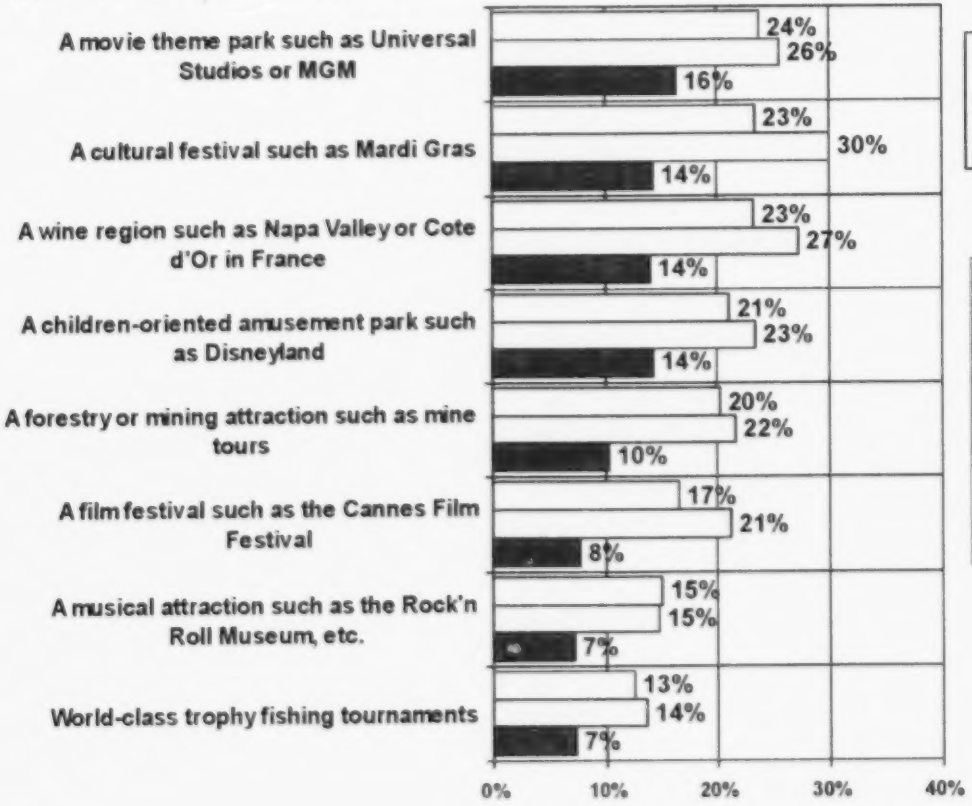
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)




Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Those who had participated in a hands-on learning experience while on vacation, as well as those who exhibited an interest in such vacation experiences, were considerably more interested in all eight of the more popular tourism attractions than the average traveller. They were especially interested in attractions with a nature theme, such as an overnight train tour through natural terrain, and a game park or game preserve with wildlife viewing areas. They also exhibited considerable interest in an aboriginal attraction and a heritage attraction.

# Interest in New Tourism Products
## By Interest in Hands-On Learning on Vacation (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



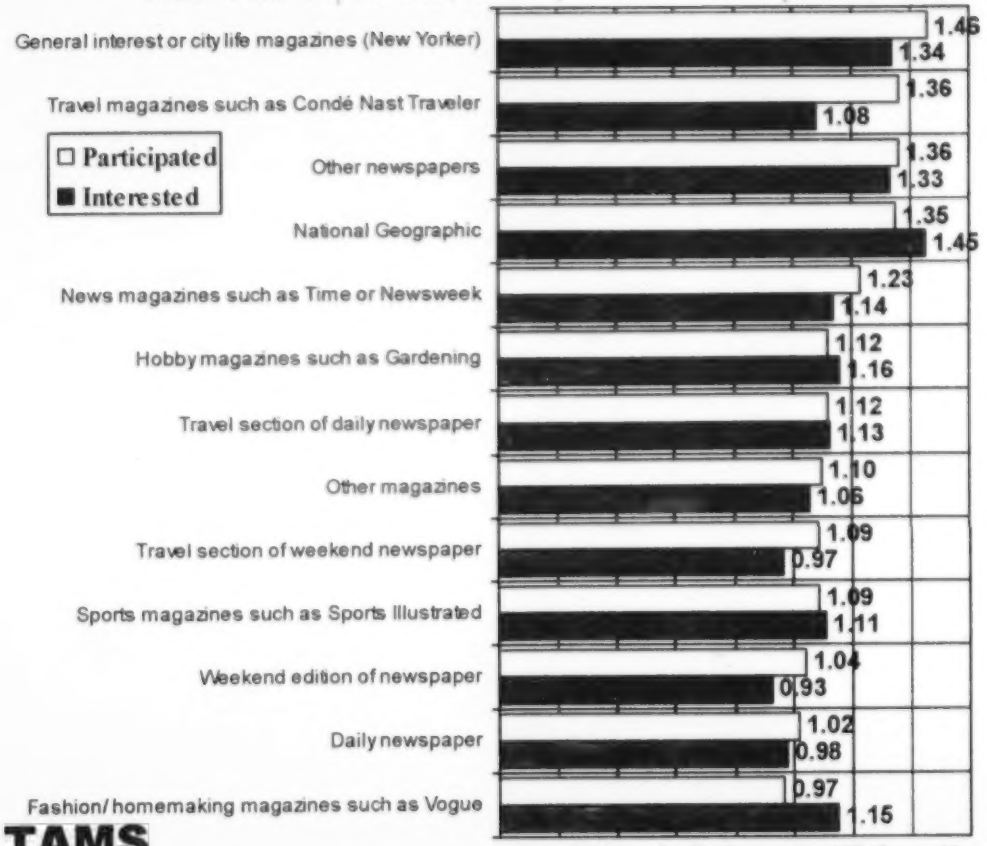

Those who had sought out a hands-on learning experience while on vacation, as well as those with an interest in such a vacation experience, also exhibited above average interest in all eight of the less popular tourism attractions. Relative to the average traveller, they exhibited particular interest in attractions with a cultural theme (e.g., cultural festivals, film festivals).

# Media Index for Print Media: Canada & United States

# By High Interest in Hands-On Learning on Vacation

Percent Reading Each Publication Type Among Those With High Interest in Hands-On Learning on Vacation By Percent Reading Each Type of Publication in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)




*TAMS: Hands-On Learning While on Vacation*

Media indexing for types of print media (see Technical Note below) suggests that general interest or city life magazines are the most efficient ways to reach those interested in vacation learning. Other types of publications that would be effective vehicles for this sector include travel magazines, specialty newspapers, National Geographic and news magazines.

**Technical Note**

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people very interested in a hands-on learning experience while on vacation were 20 % more likely to read a particular publication than the general adult population.

**TAMS**
Travel Activities & Motivation Survey

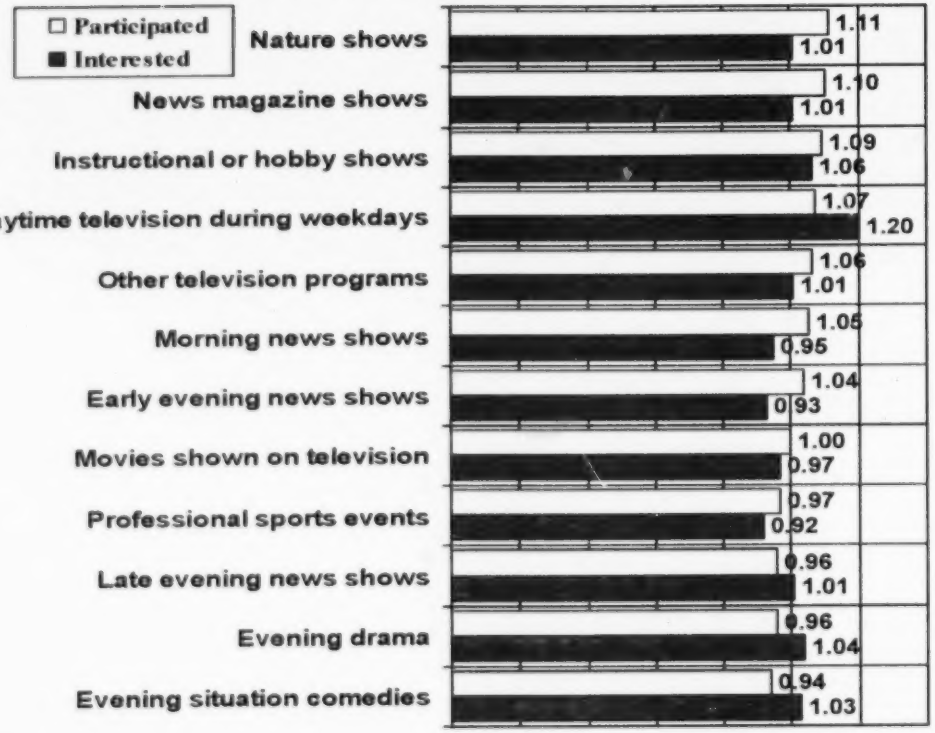
Lang RESEARCH

Media Index for Television Programs: Canada & United States

# By High Interest in Hands-On Learning on Vacation

Percent Watching Each Type of Television Program Among Those With High Interest in Hands-On Learning on Vacation By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



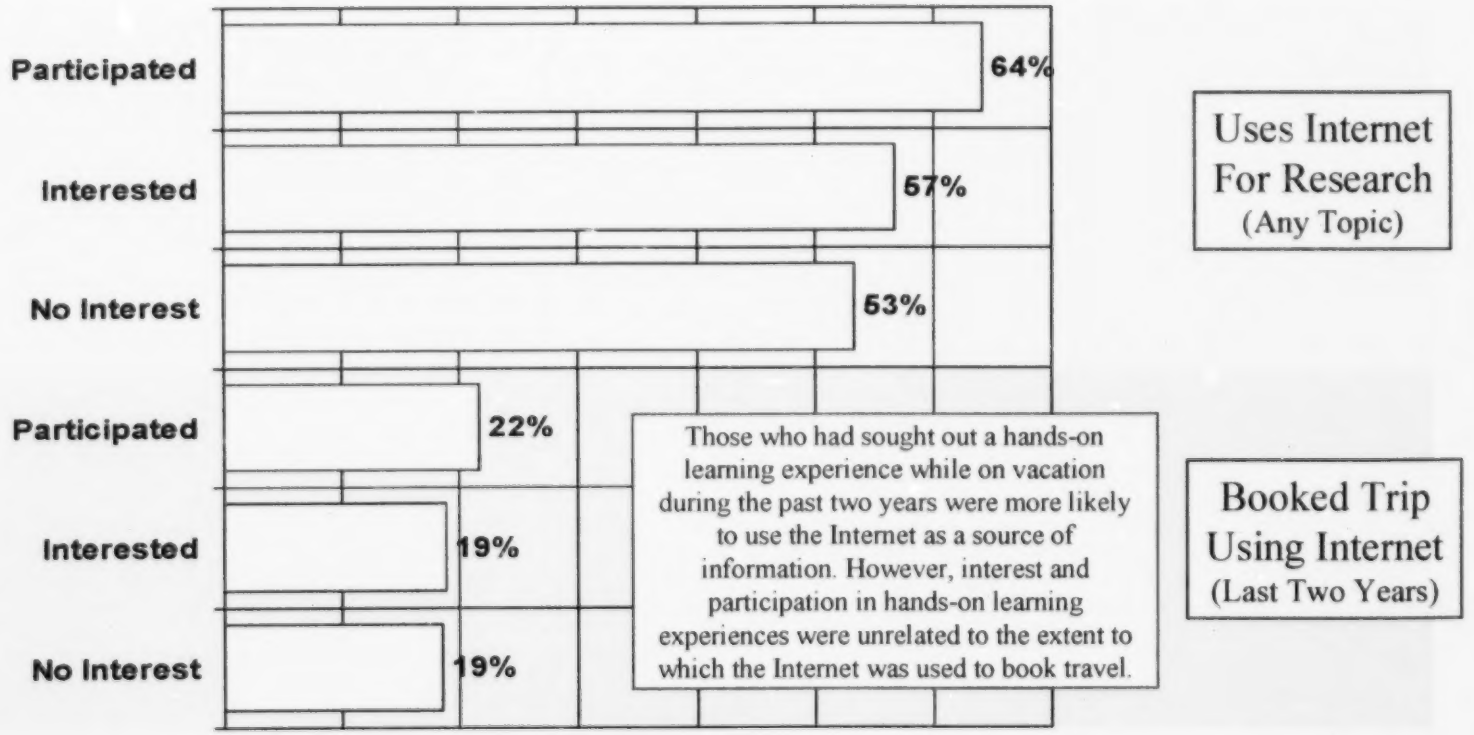

Those who sought a hands-on learning experience while on vacation were above average viewers of nature shows, news magazine shows, and instructional or hobby shows. Once again, this reflects the interest of this sector in opportunities to learn.

**Technical Note**

The Media Index is computed by dividing the percent within each segment routinely viewing each program type by the percent in the total market who routinely views each program type. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that people very interested in a hands-on learning experience while on vacation were 20 % more likely to view a particular program type than the general adult population.

# Percent Using Internet and Booking At Least One Trip Using the Internet By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

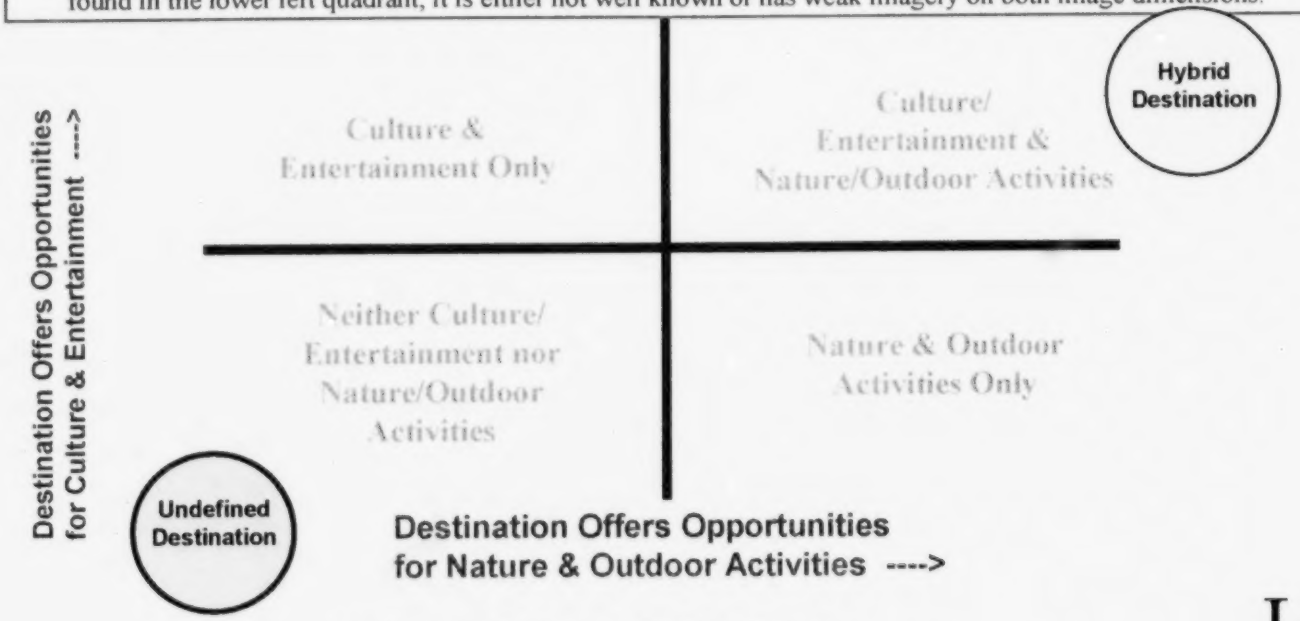

Participated
64%
Interested
57%
No Interest
53%
Participated
22%
Interested
19%
No Interest
19%
Those who had sought out a hands-on learning experience while on vacation during the past two years were more likely to use the Internet as a source of information. However, interest and participation in hands-on learning experiences were unrelated to the extent to which the Internet was used to book travel.
Uses Internet For Research (Any Topic)
Booked Trip Using Internet (Last Two Years)

# Destination Image Mapping



## - Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant, it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination, offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

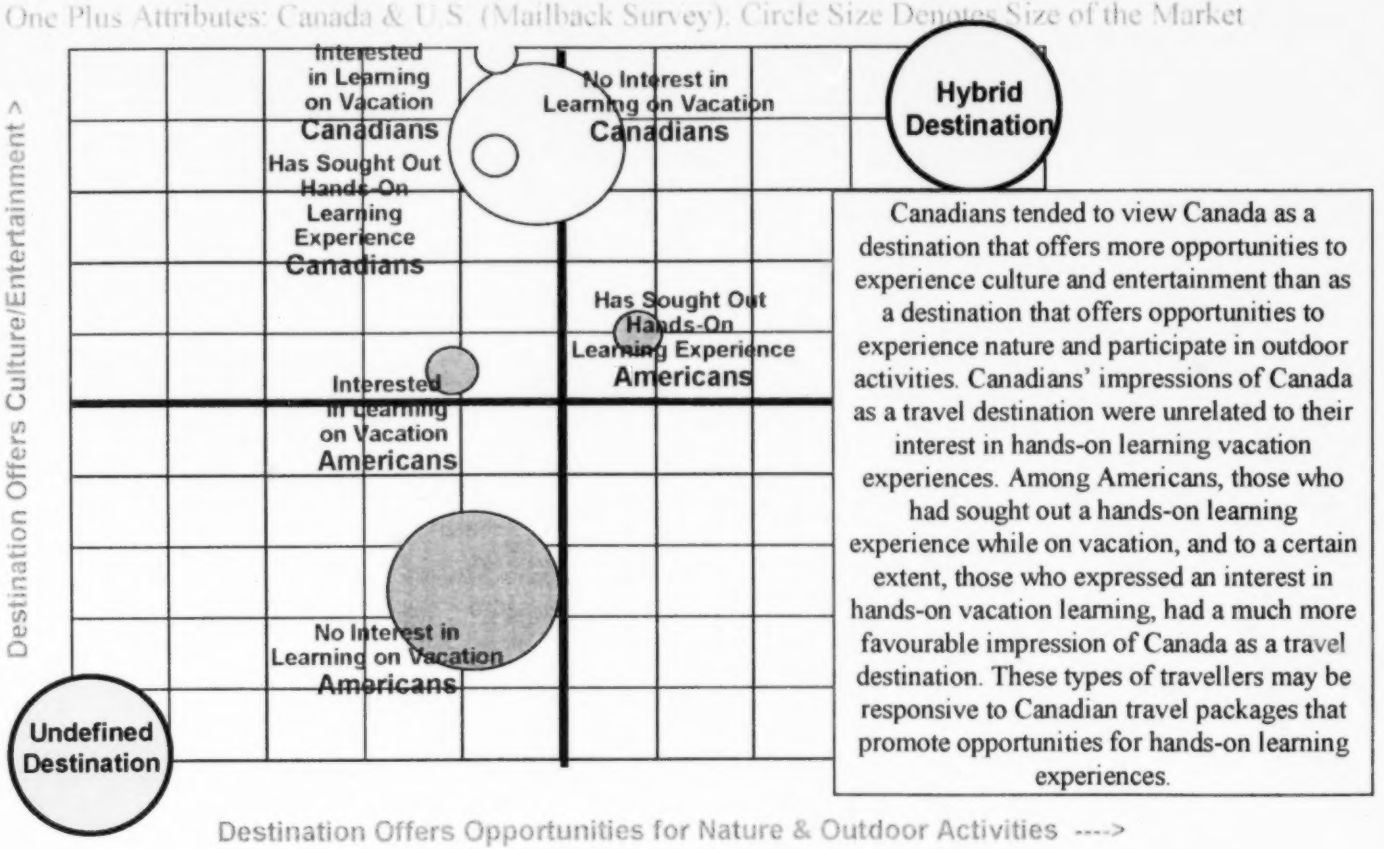

Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Hybrid Destination
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

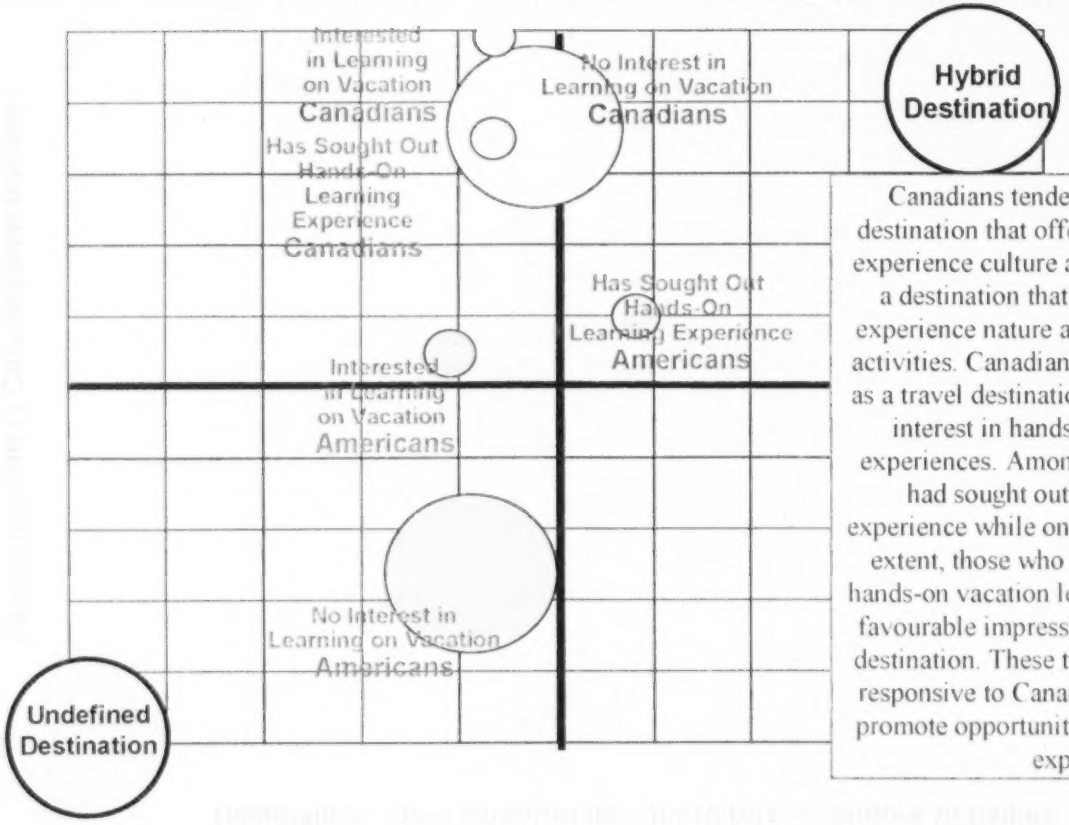
Canada and United States

# Canadian Vacation Imagery

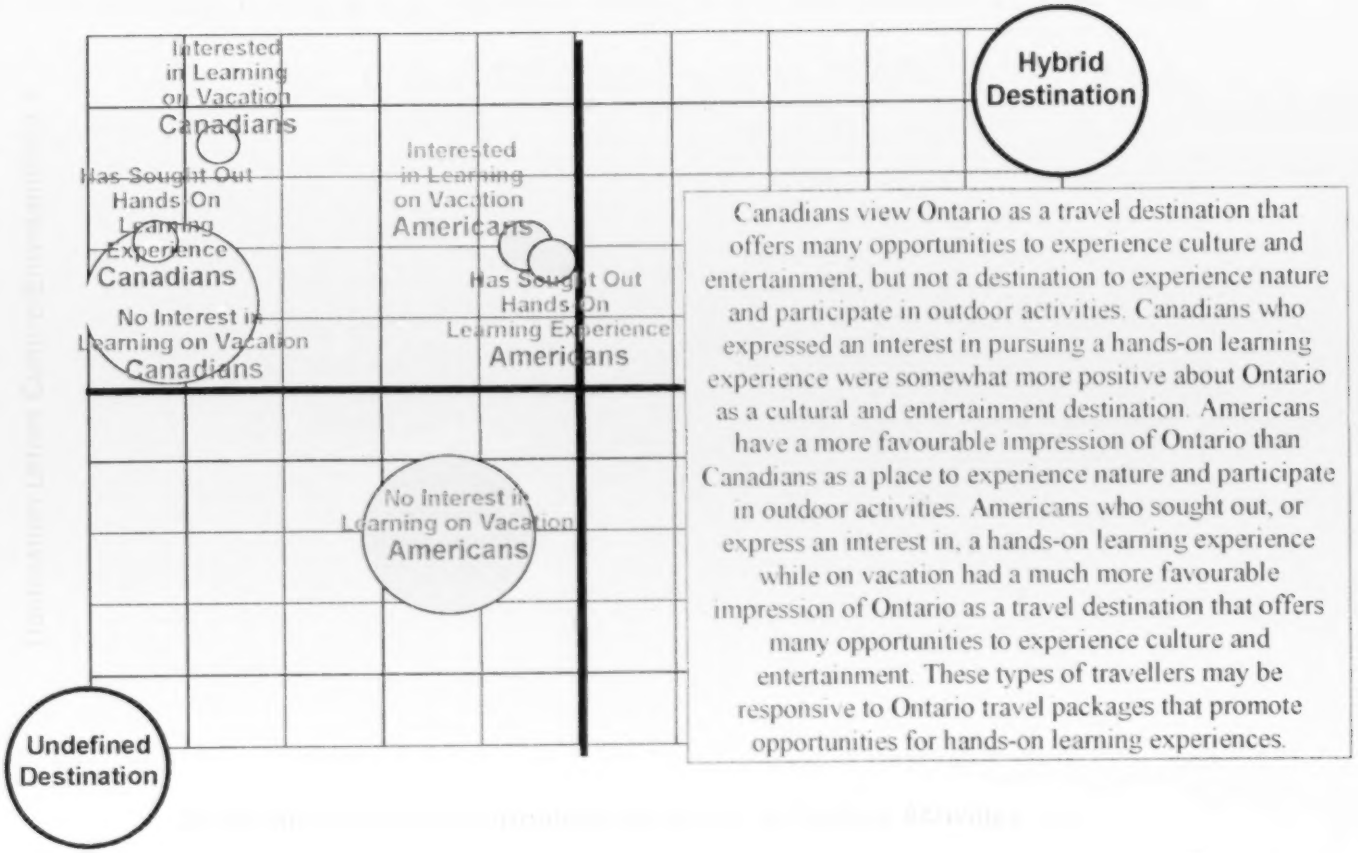
## By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Market


Interested in Learning on Vacation Canadians Has Sought Out Hands-On Learning Experience Canadians
No Interest in Learning on Vacation Canadians
Hybrid Destination
Has Sought Out Hands-On Learning Experience Americans
Interested in Learning on Vacation Americans
No Interest in Learning on Vacation Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->
Canadians tended to view Canada as a destination that offers more opportunities to experience culture and entertainment than as a destination that offers opportunities to experience nature and participate in outdoor activities. Canadians' impressions of Canada as a travel destination were unrelated to their interest in hands-on learning vacation experiences. Among Americans, those who had sought out a hands-on learning experience while on vacation, and to a certain extent, those who expressed an interest in hands-on vacation learning, had a much more favourable impression of Canada as a travel destination. These types of travellers may be responsive to Canadian travel packages that promote opportunities for hands-on learning experiences.


Interested in Learning on Vacation Canadians
Has Sought Out Hands-On Learning Experience Canadians
No Interest in Learning on Vacation Canadians
Hybrid Destination
Has Sought Out Hands-On Learning Experience Americans
Interested in Learning on Vacation Americans
No Interest in Learning on Vacation Americans
Undefined Destination

Canadians tended to view Canada as a destination that offers more opportunities to experience culture and entertainment than as a destination that offers opportunities to experience nature and participate in outdoor activities. Canadians' impressions of Canada as a travel destination were unrelated to their interest in hands-on learning vacation experiences. Among Americans, those who had sought out a hands-on learning experience while on vacation, and to a certain extent, those who expressed an interest in hands-on vacation learning, had a much more favourable impression of Canada as a travel destination. These types of travellers may be responsive to Canadian travel packages that promote opportunities for hands-on learning experiences.

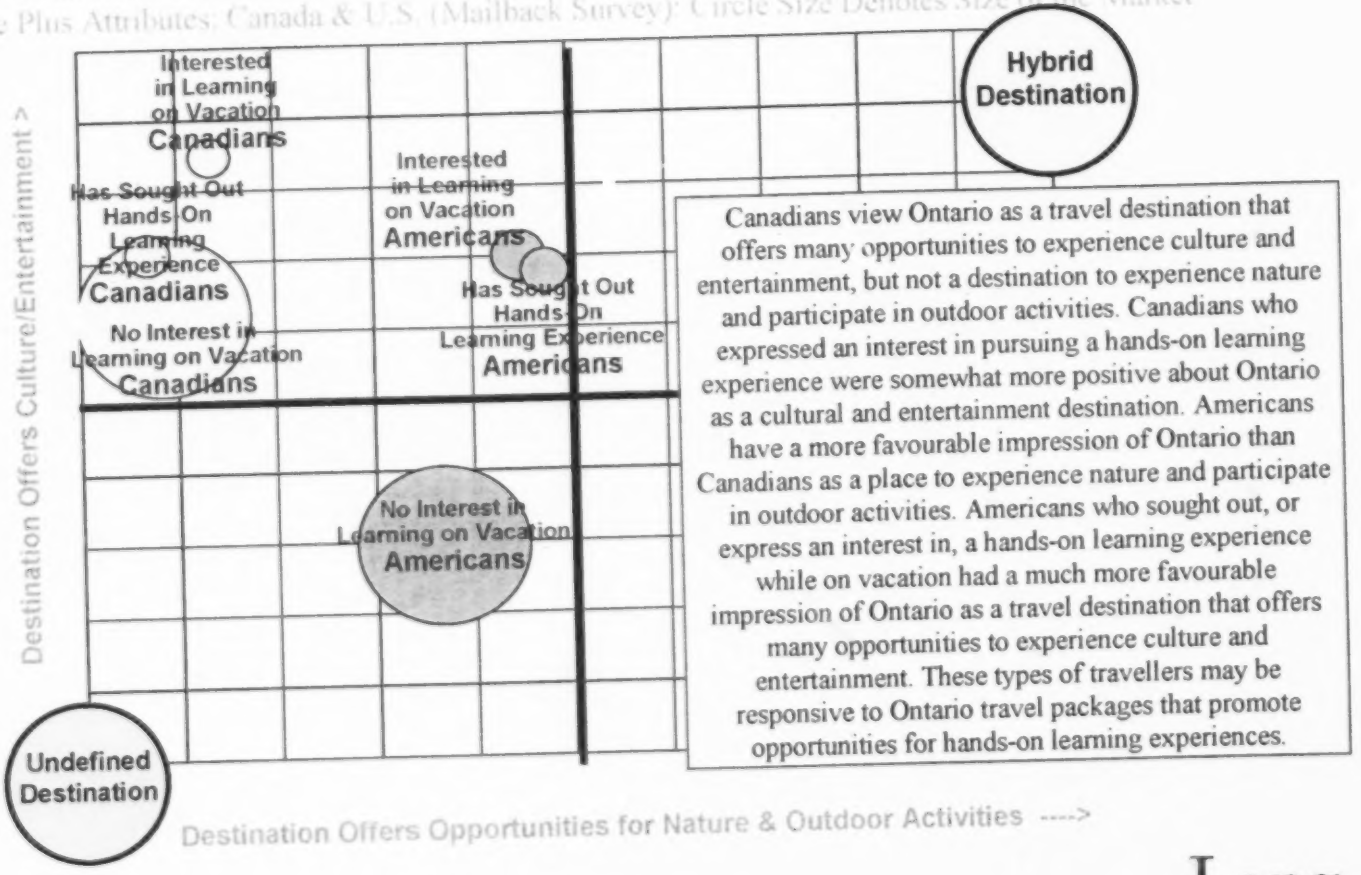

Hybrid Destination
Interested in Learning on Vacation Canadians
Has Sought Out Hands On Learning Experience Canadians
No Interest in Learning on Vacation Canadians
Interested in Learning on Vacation Americans
Has Sought Out Hands On Learning Experience Americans
No Interest in Learning on Vacation Americans
Undefined Destination
Canadians view Ontario as a travel destination that offers many opportunities to experience culture and entertainment, but not a destination to experience nature and participate in outdoor activities. Canadians who expressed an interest in pursuing a hands-on learning experience were somewhat more positive about Ontario as a cultural and entertainment destination. Americans have a more favourable impression of Ontario than Canadians as a place to experience nature and participate in outdoor activities. Americans who sought out, or express an interest in, a hands-on learning experience while on vacation had a much more favourable impression of Ontario as a travel destination that offers many opportunities to experience culture and entertainment. These types of travellers may be responsive to Ontario travel packages that promote opportunities for hands-on learning experiences.

Canada and United States

# Ontario Vacation Imagery

## By Interest in Hands-On Learning on Vacation

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes; Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Market


Hybrid Destination
Interested in Learning on Vacation Canadians
Has Sought Out Hands-On Learning Experience Canadians
No Interest in Learning on Vacation Canadians
Interested in Learning on Vacation Americans
Has Sought Out Hands-On Learning Experience Americans
No Interest in Learning on Vacation Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->

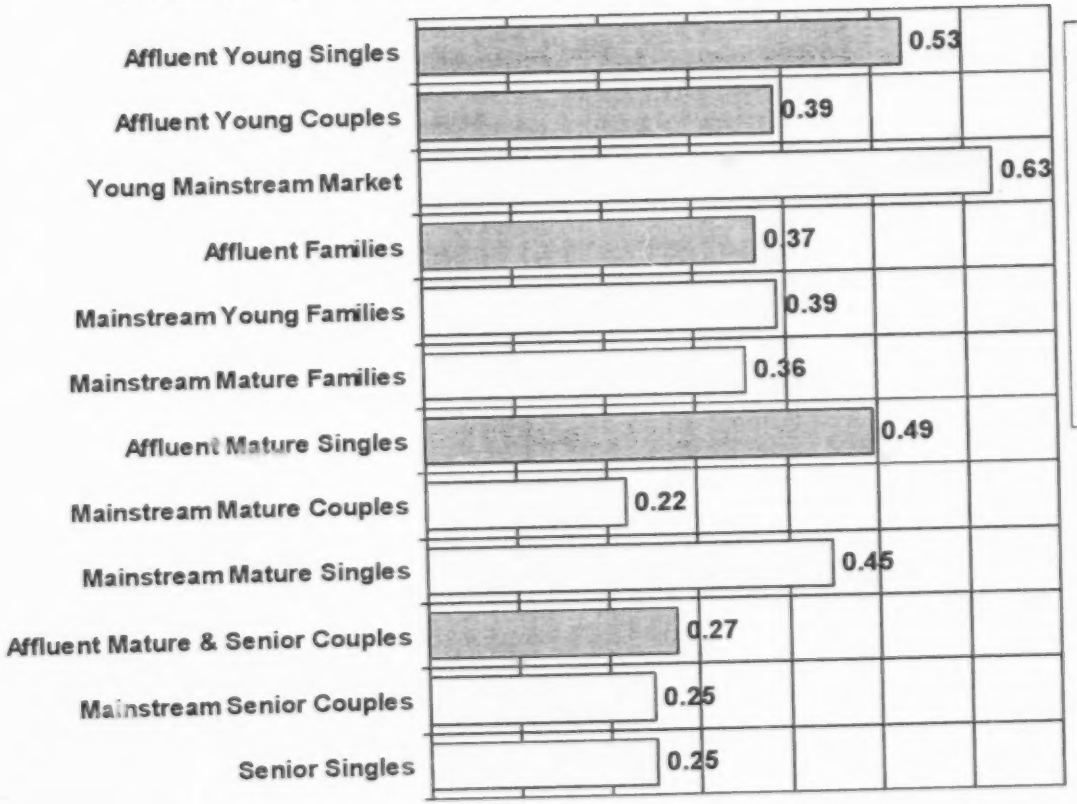
Canadians view Ontario as a travel destination that offers many opportunities to experience culture and entertainment, but not a destination to experience nature and participate in outdoor activities. Canadians who expressed an interest in pursuing a hands-on learning experience were somewhat more positive about Ontario as a cultural and entertainment destination. Americans have a more favourable impression of Ontario than Canadians as a place to experience nature and participate in outdoor activities. Americans who sought out, or express an interest in, a hands-on learning experience while on vacation had a much more favourable impression of Ontario as a travel destination that offers many opportunities to experience culture and entertainment. These types of travellers may be responsive to Ontario travel packages that promote opportunities for hands-on learning experiences.

Overall Market Potential

# Interest in Hands-On Learning on Vacation: Canada

## Interest in Hands-On Learning on Vacation By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote vacation related hands-on learning experiences. This index indicates that in Canada, the Young Mainstream Market is the most likely to be responsive to such initiatives. Secondary markets for such initiatives include the Affluent Young Singles, the Affluent Mature Singles and the Mainstream Mature Singles.

**Technical Note**

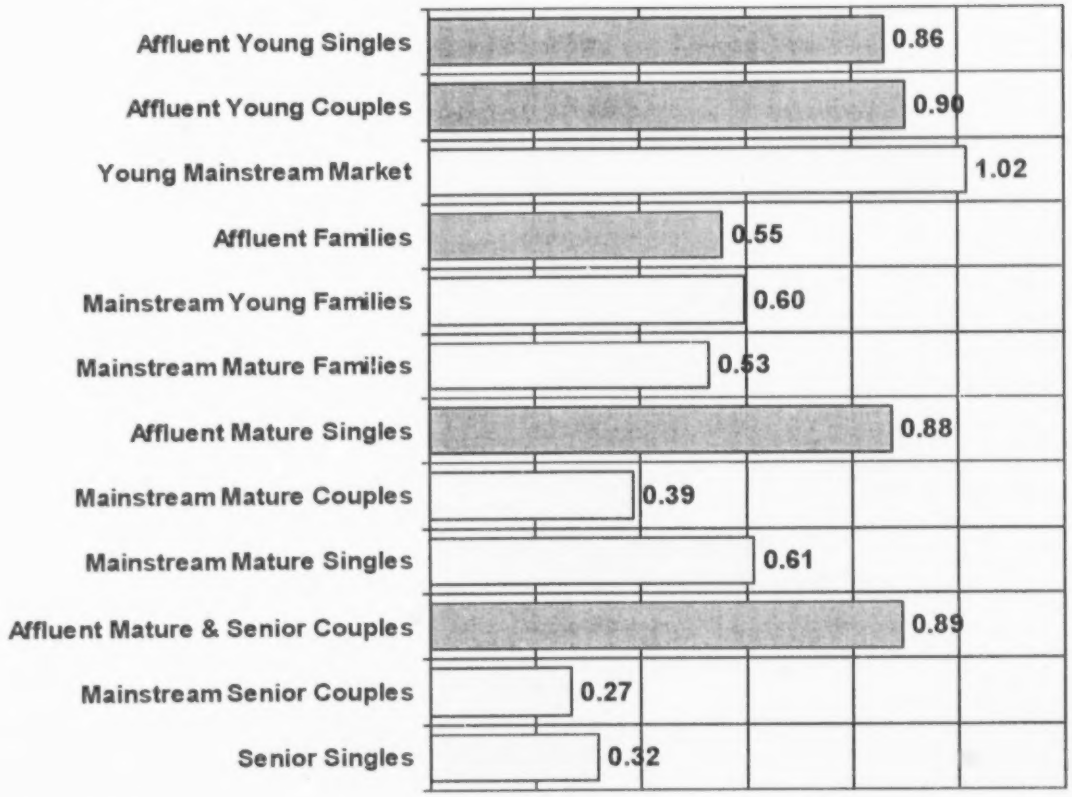
The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in a hands-on learning experience while on vacation and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

# Interest in Hands-On Learning on Vacation: U.S.

## Interest in Hands-On Learning on Vacation By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years




The Overall Market Potential Index for the United States is similar to that observed for Canada. Thus, in the United States, the Young Mainstream Market is the most likely to be responsive to initiatives promoting hands-on learning vacation experiences. Secondary markets in the United States include Affluent Young Singles, Affluent Young Couples, Affluent Mature Singles, and Affluent Mature and Senior Couples. Note that affluent singles are frequently among the most likely to seek out hands-on learning experiences while on vacation.

**Technical Note**

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in a hands-on learning experience while on vacation and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.